

Physical Content Manager Administration Guide
10g Release 3 (10.1.3.3.0)

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INTRODUCTION

OVERVIEW

This section contains the following topics:

- ❖ [About This Guide](#) (page 1-1)
- ❖ [What's New](#) (page 1-3)
- ❖ [Guide Conventions](#) (page 1-5)
- ❖ [Documentation and Help](#) (page 1-6)

ABOUT THIS GUIDE

This guide provides instructions on how to configure and administer the Physical Content Manager features of Universal Records Management (URM). It is intended mainly for server administrators, records administrators, records managers, and privileged users who work with physical content managed by Oracle's suite of content management products.



Note: The information contained in this document is subject to change as the product technology evolves and as hardware, operating systems, and third-party software are created and modified.

This guide is built up as follows:

- ❖ Chapter 1 — [Introduction](#)
- ❖ Chapter 2 — [About Physical Content Manager](#)
- ❖ Chapter 3 — [Physical Content Manager User Interface](#)
- ❖ Chapter 4 — [Physical Content Manager Security](#)
- ❖ Chapter 5 — [Configuring Physical Content Manager](#)
- ❖ Chapter 6 — [Setting Up Storage Space](#)
- ❖ Chapter 7 — [Exporting and Importing PCM Settings and Data](#)
- ❖ Chapter 8 — [Working With Barcodes](#)
- ❖ Chapter 9 — [Working With Labels](#)
- ❖ Chapter 10 — [Working With Reservations](#)
- ❖ Chapter 11 — [Working With Chargebacks](#)
- ❖ Chapter 12 — [Working With Physical Content](#)
- ❖ Chapter 13 — [Searching for Physical Content](#)
- ❖ Chapter 14 — [Processing Physical Content](#)
- ❖ Chapter 15 — [Working With the Content Basket](#)
- ❖ Appendix A — [Using the Print Report Utility](#)
- ❖ Appendix B — [Using the Barcode Utility](#)

Each chapter starts off with conceptual information about the chapter topic. This is followed by an explanation of all user interface elements associated with the topic, and then all related tasks.

WHAT'S NEW

This section highlights the main new features in Physical Content Manager 10gR3:

Compared To Version 7.1.4

Full Integration With URM

Prior to version 10gR3, Physical Content Manager was an optional add-on to the Records Manager (RM) application, and was installed as a separate product. With version 10gR3, PCM is an integral part of the Universal Records Management (URM) solution, and it may be selected as an optional feature during the URM software installation.

Chargebacks

You can now set up a chargeback environment, which enables you to charge people or businesses for the use of the storage facilities or actions performed on physical items (creation, reservation, storage, and destruction). See [Configuring Chargebacks](#) (page 5-11) and [Chapter 11 \(Working With Chargebacks\)](#) for further details.

User Interface Enhancements

The user interface has been completely overhauled to provide a more consistent and less cluttered user experience. See [Chapter 3 \(Physical Content Manager User Interface\)](#) for further details.

Compared To Version 7.1.3

New Configuration Page for Object Types

You can now define your own object types for physical content items. See [Configuring Object Types](#) (page 5-56) for further details.

New Configuration Page to Define Object Containership Rules

You can now specify what object types can be contained in other object types. This enables you to control what type(s) of physical items can be created [within another physical item](#) (see page 12-22). You define the relationships between object types on the [Edit Object Type Relationships Page](#) (page 5-62).

New Configuration Page for Media Types

You can now define your own media types for physical content items. See [Configuring Media Types](#) (page 5-66) for further details.

Creating a Storage Space Hierarchy in a Batch

You no longer need to define each individual storage location in a storage space hierarchy separately. You can use the [Create Batch Storage Import File Page](#) (page 6-24) to specify a number of creation rules that are subsequently used to generate a *StorageImport.hda* file, which can be [imported](#) to create the defined storage hierarchy (see page 7-7). This enables you to easily create structured storage space environments.

New Configuration Page to Set Default Reservation Metadata

You can now define the default metadata values that should be assigned to each reservation item that is checked into the content server for routing through the [reservations workflow](#) (see page 10-5). See [Setting Default Metadata Values for Reservation Items](#) (page 5-78) for further details.

Display of Used Storage Space as a Percentage

The [browse storage tree](#) (see page 6-10) and [exploring storage pages](#) (see page 6-12) now display the used space in a storage location as a percentage (for example, 25% to indicate that one quarter of the available storage space in the location is occupied).

Ability to Turn Off E-Mail Notification of Overdue Requests

You can now decide whether e-mail notifications are sent to users if checked-out physical item are overdue. See [Configuring Physical Content Management Settings](#) (page 5-2) for further details. In addition, you can run a [batch service](#) to immediately notify users of any overdue physical items (see page 5-9). E-mail notifications are normally sent automatically once a day at midnight.





Ability to Correct External Freeze Errors

You can now manually correct freeze errors from external sources. If an error occurs while freezing an item from an external source, it is listed in the [retention assignments list](#) of the affected user (see page 3-2). In addition, you can run a [batch service](#) to immediately notify users of any freeze errors (see page 5-9). E-mail notifications are normally sent automatically once a day at midnight.

GUIDE CONVENTIONS

Symbols

The following symbols are used throughout this document:

Symbol	Description
	Note: Brings special attention to information.
	Tech Tip: Identifies information that can be used to make your tasks easier.
	Important: Identifies a required step or required information.
	Caution: Identifies information that might cause loss of data or serious system problems.

Conventions

The following conventions are used throughout this document:

- ❖ The notation *[CS_Instance_Dir]* is used to refer to the location on your system where a specific instance of Content Server is installed.
- ❖ Forward slashes (/) are used to separate parts of an Internet address. For example, <http://www.microsoft.com/windows2000/>. A forward slash might or might not appear at the end of an Internet address.
- ❖ Backward slashes (\) are used to separate the levels in a path to a server, directory, or file. For example, *C:\Directory*. This is true when referring to files on a Windows file system or on a UNIX system. A backward slash will always appear after the end of a server, directory, or file path.
- ❖ Paths to access operating system screens use the following formatting structure:
Start—Settings—Control Panel
- ❖ Required user input is distinguished using the following font formatting:
xyz_name



Note: This guide assumes that you are using the default Trays layout.

DOCUMENTATION AND HELP

This section covers the following topics:

- ❖ [Documentation](#) (page 1-6)
- ❖ [Tooltips](#) (page 1-7)
- ❖ [Quick Help](#) (page 1-7)
- ❖ [Help Menu](#) (page 1-7)

Documentation

The following Physical Content Manager documentation is available:

- ❖ **Physical Content Manager User Guide**

This document provides information on using the Physical Content Manager application on the content server. It is provided as a PDF file and HTML help system, both of which can be accessed from the Physical Content Manager user interface (on user pages). The PDF file is also available on the Physical Content Manager software distribution media.

- ❖ **Physical Content Manager Administration Guide** (this guide)

This document provides information on setting up and administering the Physical Content Manager application on the content server. It is provided as a PDF file and HTML help system, both of which can be accessed from the Physical Content Manager user interface (on administration pages). The PDF file is also available on the Physical Content Manager software distribution media.



Note: For details on enabling and setting up the Physical Content Manager features in Universal Records Management (URM), refer to the *Universal Records Management Installation Guide*.



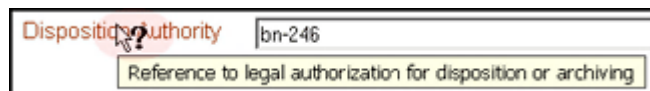
Note: All information contained in the *Physical Content Manager User Guide* is also included in the *Physical Content Manager Administration Guide*.

In addition to these guides, you can also access information about the product with context-sensitive [tooltips](#), [quick help](#), and [help menu](#).

Tooltips

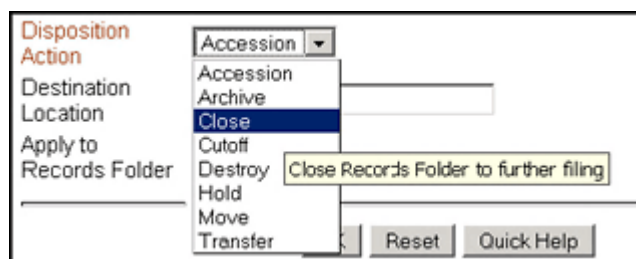
If you hover the mouse cursor over a field label in your web browser, you can get context-sensitive information on the field label. A question mark is displayed, and then the tooltip appears.

Figure 1-1 Field label tooltip



If you are using Netscape, Mozilla, or Firefox as your web browser, you can view tooltips for items in options lists as well, provided the list items are not custom entries.

Figure 1-2 Option list item tooltip (only supported by Netscape, Mozilla, and Firefox browsers)



Quick Help

Click the **Quick Help** button where available on pages and screens to view context-sensitive help for that page or screen.

Help Menu

You can click the main menu Help link to open the online HTML help system for Content Server, which includes the Physical Content Manager help files. If you are logged in with user privileges, you will only see the end-user help system. If you are logged in as an administrator, you will see the full administrator help system (including the user documentation).

ABOUT PHYSICAL CONTENT MANAGER

OVERVIEW

This section covers the following topics:

- ❖ [About Physical Content Manager](#) (page 2-1)
- ❖ [Physical Content Manager and Universal Records Management](#) (page 2-2)
- ❖ [Physical Content Manager and Content Server](#) (page 2-3)
- ❖ [Setting up a Physical Content Management Environment](#) (page 2-3)

ABOUT PHYSICAL CONTENT MANAGER

Physical Content Manager (PCM) is an optional feature of the Universal Records Management (URM) application. URM enables organizations to manage the retention and disposition of records and non-record content. Physical Content Manager provides the capability of managing physical records and non-record content that are not stored in the content server in electronic form. All items—both internal and external, regardless of their source or format—are managed in a single, consistent, manageable infrastructure using one central application and a single user interface. The same file plan and retention schedules are used for both electronic (internal) and physical (external) records and non-record content.

Physical Content Manager keeps track of the storage locations and retention schedules of the physical records and content. The application provides the following main features:

- ❖ **Space management**, including definition of warehouse layout, searching for empty space, reserving space, and tracking occupied and available space.
- ❖ **Circulation services**, including handling reservation requests for items, checking out items, and maintaining a due date for checked-out items.
- ❖ **Chargeback services**, including invoicing, for the use of storage facilities and/or actions performed on physical items.
- ❖ **Barcode file processing**, including uploading barcode information directly into the system, or processing barcode files manually.
- ❖ **Label creation and printing**, including labels for users, storage locations, or individual physical items.
- ❖ **Retention management**, including periodic reviews, freezes and litigation holds, and e-mail notifications for pending events.

PHYSICAL CONTENT MANAGER AND UNIVERSAL RECORDS MANAGEMENT

Physical Content Manager (PCM) is an optional feature of Universal Records Management (URM), and as such has the same look-and-feel as URM. The Physical Content Manager software adds a number of new interface elements, and also modifies some existing Content Server and Records Manager pages. See [Chapter 3 \(Physical Content Manager User Interface\)](#) for further details.

Since Physical Content Manager is closely tied to URM, it shares most security features with it. As a result, some URM rights may be required to perform certain PCM tasks, mostly administrative in nature. See [Chapter 4 \(Physical Content Manager Security\)](#) for further details.



Note: For details on enabling and setting up the Physical Content Manager features of URM, refer to the *Universal Records Management Installation Guide*.

PHYSICAL CONTENT MANAGER AND CONTENT SERVER

Physical Content Manager runs within a Content Server instance (as part of Universal Records Management). It supports the following Content Server layouts and search templates (which users can set in their user profile):

- ❖ Supported layouts:
 - Trays
 - Top Menus
- ❖ Supported search templates:
 - Headline View
 - Thumbnail View



Note: Physical Content Manager does not support the Classic layout or the Classic View search template.



Note: This guide assumes you are using the default Trays layout.

SETTING UP A PHYSICAL CONTENT MANAGEMENT ENVIRONMENT

Use the following checklist to assist you with your initial setup of Physical Content Manager (PCM). It is recommended that you follow the suggested order in the list for best results.

- [Set up the required PCM user roles and rights](#) (see chapter 4)
- [Configure the PCM environment](#) (see chapter 5)
- [Define the storage space environment](#) (see chapter 6)
- [Define disposition rules for physical content](#), if required (see chapter 5)



Note: If you need to migrate and integrate existing data, it is recommended that you seek the assistance of Oracle's consulting services.

PHYSICAL CONTENT MANAGER USER INTERFACE

OVERVIEW

If Physical Content Manager (PCM) is installed correctly, the standard Content Server and Records Manager user interface are modified in a number of ways:

- ❖ [PCM Items in My Content Server](#) (page 3-1)
- ❖ [PCM Items in My Approval List](#) (page 3-2)
- ❖ [PCM Items in External Content](#) (page 3-3)
- ❖ [PCM Menu Bars](#) (page 3-3)
- ❖ [PCM Items in Records Manager and Content Server Interface](#) (page 3-4)

PCM ITEMS IN MY CONTENT SERVER

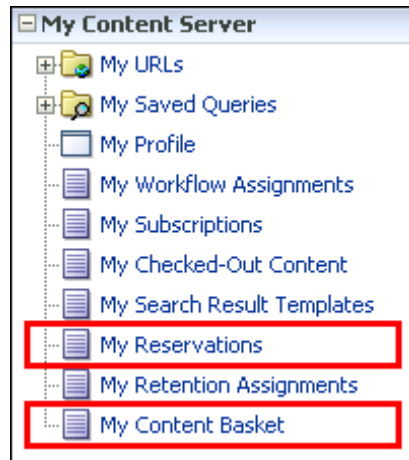
If Physical Content Manager is installed correctly, the **My Content Server** tray or top menu in the Content Server user interface includes the following new items:

- ❖ **My Reservations**
Choose this option to open a page which lists all items that you have currently reserved. See [Chapter 10 \(Working With Reservations\)](#) for further details.

❖ **My Content Basket**

Choose this option to open a page which lists all items that are currently in your content basket. See [Chapter 15 \(Working With the Content Basket\)](#) for further details.

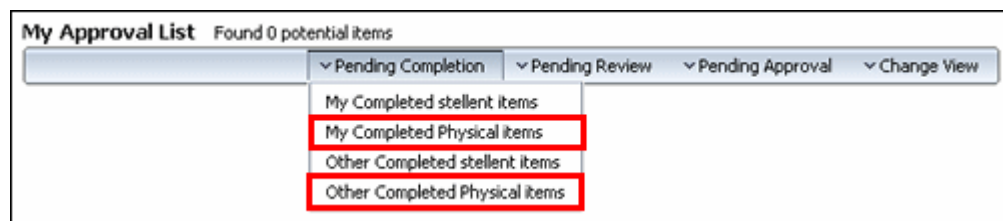
Figure 3-1 PCM-related items in My Content Server tray



PCM ITEMS IN MY APPROVAL LIST

Physical items are also included in the lists on the **My Approval List** page:

Figure 3-2 Physical items in My Approval List menus

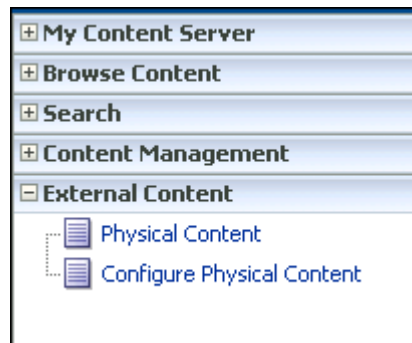


If there are any pending physical items to review, approve, or mark as completed, then the corresponding pages contain links to these physical items. See [Chapter 14 \(Processing Physical Content\)](#) and the *Records Manager System Maintenance Guide* for more information about retention assignments and the My Approval List page.

PCM ITEMS IN EXTERNAL CONTENT

If Physical Content Manager is installed correctly, there is an **External Content** tray or top menu item in Content Server's user interface, which contains two items called **Physical Content** and **Configure Physical Content**.

Figure 3-3 PCM items in External Content tray



Physical Content

If you click **Physical Content** in the External Content tray, the [Basic Search Page](#) (page 13-2) is displayed, where you can search for physical content and also perform a number of other tasks related to physical content (using the menu on that page).

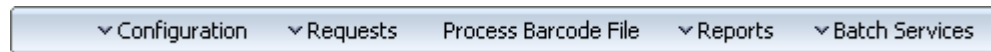
Configure Physical Content

If you click **Configure Physical Content**, the [Configure Physical Content Management](#) page is displayed (see page 5-2), where you can set up the physical content management environment and also perform a number of other administrative tasks (using the menu on that page).

PCM MENU BARS

Most Physical Content Manager pages have a menu bar, which contains a number of menu options that are relevant to the information or items presented on that page. The available options on the menu bar depend on where you are in the application and on your assigned access privileges.

Figure 3-4 Example of PCM menu bar



PCM ITEMS IN RECORDS MANAGER AND CONTENT SERVER INTERFACE

Physical Content Manager adds a number of new user interface elements to some Records Manager and Content Server interface elements, for example:

- ❖ Some PCM-related items are added to the [Import/Export Archive and Export Archive page](#) (see chapter 7) of Records Manager.
- ❖ A source selection check box for physical content is added to the [Screening for Content and Records page](#) (see page 13-9) in Records Manager, which enables you to include or exclude physical content from the screening operations.
- ❖ A source selection field is added to the [Search Audit Trail page](#) (see page 14-4), which enables you to search for physical content in the audit log. For details on the audit trail, refer to the *Records Manager System Maintenance Guide*.
- ❖ A barcode field is added to the user properties tab of the [User Admin utility](#) (see page 5-88), which enables you to set unique barcode values for users that are used in the barcodes of the users (rather than their login names in upper-case letters).

PHYSICAL CONTENT MANAGER SECURITY

OVERVIEW

This section deals with Physical Content Manager security. It covers the following topics:

- ❖ [About Physical Content Manager Security](#) (page 4-1)
- ❖ [Physical Content Manager Roles](#) (page 4-2)
- ❖ [Physical Content Manager Rights](#) (page 4-3)
- ❖ [Edit ECM Rights Dialog](#) (page 4-9)
- ❖ [Setting Rights for Roles](#) (page 4-15)

ABOUT PHYSICAL CONTENT MANAGER SECURITY

Since Physical Content Manager (PCM) is an optional feature of Universal Records Management (URM), all security features for URM also apply to physical content management. For more information on URM's security features, refer to the *Records Manager System Setup Guide*.

In addition to the security “inherited” from URM, the Physical Content Manager application also has some security features of itself:

- ❖ [PCM roles](#) (see page 4-2)
- ❖ [PCM rights](#) (see page 4-3)

As with the standard Content Server and URM security models, the final determination of permissions and privileges for Physical Content Manager is determined by the intersection of all security mechanisms in place; in other words, the strictest setting prevails.

PHYSICAL CONTENT MANAGER ROLES

The out-of-the-box Physical Content Manager application comes with two predefined roles:

❖ **pcmrequestor**

This role is generally assigned to “privileged” users in the physical content management environment, who have all the permissions that basic users without a PCM role have, but are also granted additional rights to perform some functions not allowed for basic users (for example, making reservations for physical items).

Users with the ‘pcmrequestor’ role have read and write permissions (RW) for the special RecordsGroup security group.

❖ **pcmadmin**

This role is generally assigned to system administrators who are responsible for setting up and maintaining the physical content management infrastructure and environment. These users have the widest range of [rights](#) to perform physical content management tasks (for example, setting up the storage space, editing and deleting reservations, and printing user labels).

Users with the ‘pcmadmin’ role have read, write, delete, and admin permissions (RWDA) for the special RecordsGroup security group

Each of these predefined roles comes with a default set of [permissions and rights](#) (see page 4-3) that define that users with that role are allowed to do, but these can be modified to suit your specific needs. You can also create new roles and assign physical content management rights to them, or grant physical content management rights to existing Content Server or Records Manager roles. This enables you to define a very granular security model for your content management environment.



Note: If users have no PCM role assigned to them, they can still [search](#) for physical items (see chapter 13).



Note: Role permissions are additive, just as in Content Server and Records Manager. If your organization uses accounts, the accounts are a hierarchical overlay to your current security model.



Important: Upon installation of the Physical Content Manager software, Content Server's 'sysadmin' user is automatically assigned the predefined PCM 'pcadmin' and 'pcmrequestor' roles. No other users will have any PCM rights by default. You need to [assign PCM rights](#) to these users before they can start using the physical content management functionality (see page 4-15).

PHYSICAL CONTENT MANAGER RIGHTS

Access to the majority of Physical Content Manager (PCM) functions is controlled by rights that are assigned to Content Server or Records Manager user roles. The two predefined physical content management [roles](#) ('pcmrequestor' and 'pcadmin') each have a default set of rights assigned to them, but the roles can easily be modified to restrict or expand their access to physical content management functions (see [Setting Rights for Roles](#) on page 4-15 for details). You can also create new roles and assign physical content management rights to them, or grant physical content management rights to existing Content Server or Physical Content Manager roles. This enables you to define a very granular security model to suit your content management environment.

Administrators (typically assigned the 'pcadmin' role) have access to the widest range of Physical Content Manager functions. Their default rights allow them to perform most physical content management tasks, including security, configuration, and maintenance. Other users—for example, those assigned the 'pcmrequestor' role—may be granted limited access to a subset of the available functions, such as making reservations or creating external, physical content.



Important: Upon installation of the Physical Content Manager software, Content Server's 'sysadmin' user is automatically assigned the predefined PCM 'pcadmin' and 'pcmrequestor' [roles](#). No other users will have any PCM rights by default. You need to [assign PCM rights](#) to these users before they can start using the physical content management functionality (see page 4-15).

The table below gives more detailed information on tasks that can be performed in Physical Content Manager and the rights required to perform each task.

Physical Content Manager Function	Required Right	Defaults Rights for Roles	
		pcmrequestor	pcmadmin
STORAGE SPACE (see chapter 6)			
View information about storage locations	PCM.Storage.Read	X	X
Create individual storage locations	PCM.Storage.Create		X
Create storage locations in batches	PCM.Admin.Manager		X
Edit storage locations	PCM.Storage.Edit		X
Delete storage locations	PCM.Storage.Delete		X
Reserve storage locations	PCM.Storage.Reserve	X	X
Block storage locations	PCM.Storage.Block		X
Print labels for storage locations	PCM.Admin.PrintLabel		X
Import batch created storage hierarchy	Admin.FilePlanArchive in Records Manager		
PHYSICAL ITEMS (see chapters 12 through 15)			
View information about physical items	PCM.Physical.Read <i>and</i> PCM.Storage.Read	X	X
Create (check in) physical items	PCM.Physical.Create <i>and</i> PCM.Storage.Read	X	X
Edit physical items	PCM.Physical.Edit <i>and</i> PCM.Storage.Read	X	X

Physical Content Manager Function	Required Right	Defaults Rights for Roles	
		pcmrequestor	pcmadmin
Move physical items	PCM.Physical.Edit <i>and</i> PCM.Physical.Move <i>and</i> PCM.Storage.Read		X
Delete physical items	PCM.Physical.Delete <i>and</i> PCM.Storage.Read		X
Search for physical items	PCM.Physical.Read <i>and</i> PCM.Storage.Read	X	X
Print labels for physical items	PCM.Admin.PrintLabel		X
Freeze or unfreeze physical items	Record.Freeze/Unfreeze (in Records Manager)		
Manually override external freeze errors	Admin.PerformActions (in Records Manager)		
Screen for physical items (in Records Manager)	Admin.Screening (in Records Manager)		
RESERVATIONS (see chapter 10)			
View reservation information for physical content	PCM.Reservation.Read	X	X
Create a reservation request	PCM.Reservation.Create	X	X
Edit a reservation request	PCM.Reservation.Edit		X
Delete a reservation request	PCM.Reservation.Delete		X
Process a reservation request	PCM.Reservation.Process		X
Run request reports	PCM.Admin.Manager		X

Physical Content Manager Function	Required Right	Defaults Rights for Roles	
		pcmrequestor	pcmadmin
Configure default metadata for reservations	PCM.Admin.Manager		X
LOCATION TYPES (see chapter 5)			
Set up location types	PCM.Admin.Manager <i>and</i> PCM.Admin.Location Types		X
OBJECT TYPES (see chapter 5)			
Set up object types	PCM.Admin.Manager		X
MEDIA TYPES (see chapter 5)			
Set up media types	PCM.Admin.Manager		X
CUSTOM METADATA FIELDS (see chapter 5)			
Set up custom metadata fields for physical content management	PCM.Admin.Manager		X
CHARGEBACKS (see chapter 11)			
Set up charge types, payment types, and billers	PCM.Admin.Manager <i>and</i> CBC.ChargeBacks.Admin		X
View information of chargeback-related items (transactions, invoices, etc.)	PCM.Admin.Manager <i>and</i> CBC.ChargeBacks.Admin <i>and</i> CBC.ChargeBacks.Read		X

Physical Content Manager Function	Required Right	Defaults Rights for Roles	
		pcmrequestor	pcmadmin
Create chargeback-related items (transactions, invoices, etc.)	PCM.Admin.Manager <i>and</i> CBC.ChargeBacks.Admin <i>and</i> CBC.ChargeBacks.Create		X
Edit chargeback-related items (transactions, invoices, etc.)	PCM.Admin.Manager <i>and</i> CBC.ChargeBacks.Admin <i>and</i> CBC.ChargeBacks.Edit		X
Delete chargeback-related items (transactions, invoices, etc.)	PCM.Admin.Manager <i>and</i> CBC.ChargeBacks.Admin <i>and</i> CBC.ChargeBacks.Delete		X
Screen for charges	PCM.Admin.Manager <i>and</i> CBC.ChargeBacks.Admin		X
Browse invoices	PCM.Admin.Manager <i>and</i> CBC.ChargeBacks.Admin		X
Print invoices	PCM.Admin.Manager <i>and</i> CBC.ChargeBacks. PrintInvoices		X
Adjust invoices (for example, to manually change invoice amounts)	PCM.Admin.Manager <i>and</i> CBC.ChargeBacks.Adjust		

Physical Content Manager Function	Required Right	Defaults Rights for Roles	
		pcmrequestor	pcmadmin
ARCHIVES (see chapter 7)			
Import archives and PCM settings	Admin.FilePlanArchive in Records Manager		
Import batch created storage hierarchy	Admin.FilePlanArchive in Records Manager		
Export archives and PCM settings	Admin.FilePlanArchive in Records Manager <i>and</i> 'admin' role in Content Server		
BARCODES (see chapter 8)			
Process barcode files	PCM.Barcode.Process		X
LABELS (see chapter 9)			
Print labels for users	PCM.Admin.PrintLabel		X
Print labels for storage locations	PCM.Admin.PrintLabel		X
Print labels for physical items	PCM.Admin.PrintLabel		X
ADMINISTRATIVE TASKS (see chapter 5)			
Configure physical content management environment	PCM.Admin.Manager		X
Run batch services	PCM.Admin.Manager		X
Set up charge types for chargebacks	PCM.Admin.Manager <i>and</i> CBC.ChargeBacks.Admin		X

Physical Content Manager Function	Required Right	Defaults Rights for Roles	
		pcmrequestor	pcmadmin
Set up payment types for chargebacks	PCM.Admin.Manager <i>and</i> CBC.ChargeBacks.Admin		X
Set up billers for chargebacks	PCM.Admin.Manager <i>and</i> CBC.ChargeBacks.Admin		X
Set up location types	PCM.Admin.Manager <i>and</i> PCM.Admin.Location Types		X
Set up object types	PCM.Admin.Manager		X
Set up media types	PCM.Admin.Manager		X
Set up custom metadata fields for physical content management	PCM.Admin.Manager		X



Note: The above table outlines the default, out-of-the-box situation. Physical Content Manager's security model is highly customizable, which means that it can be modified to suit the needs of your specific content management environment.

EDIT ECM RIGHTS DIALOG

Use the Edit ECM Rights dialog to assign physical content management rights to Content Server, Records Manager, or Physical Content Manager roles. To access it, complete the following steps:

1. Log into the content server as a system administrator.
2. Open the **Administration** tray or top menu of your content server instance.
3. Click **Admin Applets**.

The Administration Applets page for your server is displayed.

4. Click the **User Admin** icon.

The User Admin utility starts.

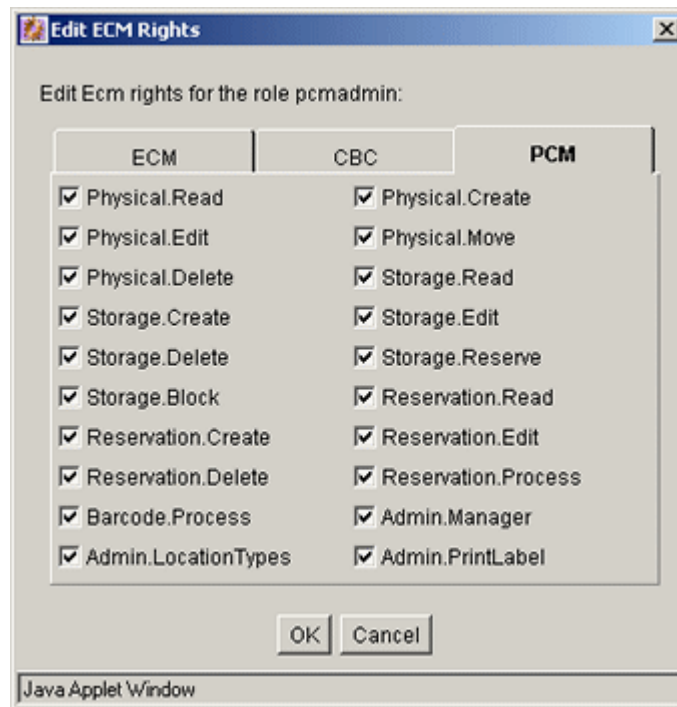
5. Choose **Security—Permissions by Role** from the menu.

The Permissions by Role dialog is displayed.

6. Select the role whose Physical Content Manager rights you want to review or modify, and click **Edit ECM Rights**.

The Edit ECM Rights dialog is displayed.

Figure 4-1 Edit ECM Rights dialog (PCM tab)



Dialog Features

This dialog has three tabs:

- ❖ **ECM**—The ECM tab controls access rights to external content by agents that operate outside of Records Manager. These rights do not apply to Physical Content Manager as it is a feature of Records Manager and operates within its framework. Each of the available agents has its own documentation.
- ❖ **CBC**—The **CBC tab** controls access rights to the [chargeback](#) functionality of Physical Content Manager (see below).

- ❖ **PCM**—The **PCM tab** controls access rights to the Physical Content Manager features other than chargebacks (see below).



Note: Some of the rights are interconnected. This means that enabling or disabling certain options will automatically also enable or disable other options. For example, if you disable the Storage.Create right on the PCM tab, then the Storage.Edit right is disabled as well. Conversely, if you enable the Reservation.Edit right, then the Reservation.Read and Reservation.Create right are enabled automatically (if they were not already enabled).

CBC Tab

The table below describes the features of the CBC tab on the Edit ECM Rights dialog, as well as the default rights for each of the predefined Physical Content Manager roles.

Feature	Description	Defaults Rights for Roles	
		pcmrequestor	pcmadmin
CHARGEBACK RIGHTS			
ChargeBacks.Read	If you enable this option, the user is allowed to view information about chargeback-related items (transactions, invoices, etc.)		X
ChargeBacks.Create	If you enable this option, the user is allowed to create chargeback-related items (transactions, invoices, etc.)		X
ChargeBacks.Edit	If you enable this option, the user is allowed to edit chargeback-related items (transactions, invoices, etc.)		X
ChargeBacks.Delete	If you enable this option, the user is allowed to delete chargeback-related items (transactions, invoices, etc.)		X
ChargeBacks.PrintInvoices	If you enable this option, the user is allowed to print invoices (see page 11-24).		X

Feature	Description	Defaults Rights for Roles	
		pcmrequestor	pcmadmin
ChargeBacks.MarkPaid	If you enable this option, the user is allowed to mark invoices as paid (see page 11-26)		X
ChargeBacks.Adjust	If you enable this option, the user is allowed to adjust invoices , for example to manually override invoice amounts (see page 11-22).		X
ChargeBacks.Admin	If you enable this option, the user is allowed to perform a number of administrative chargeback tasks , for example, define new charge types, payment types, and billers (see page 5-11).		X

PCM Tab

The table below describes the features of the PCM tab on the Edit ECM Rights dialog, as well as the default rights for each of the predefined Physical Content Manager roles.

Feature	Description	Defaults Rights for Roles	
		pcmrequestor	pcmadmin
PHYSICAL CONTENT RIGHTS			
Physical.Read	If you enable this option, the user is allowed to view information about a physical item (see page 12-11).	X	X
Physical.Create	If you enable this option, the user is allowed to create a physical item (see page 12-3).	X	X

Feature	Description	Defaults Rights for Roles	
		pcmrequestor	pcmadmin
Physical.Edit	If you enable this option, the user is allowed to edit a physical item (see page 12-3).	X	X
Physical.Move	If you enable this option, the user is allowed to move a physical item (see page 12-24) (i.e., change the current and/or permanent location of an item).		X
Physical.Delete	If you enable this option, the user is allowed to delete a physical item (see page 12-23).		X
STORAGE RIGHTS			
Storage.Read	If you enable this option, the user is allowed to view information about a storage location (see page 6-36).	X	X
Storage.Create	If you enable this option, the user is allowed to create a new storage location (see page 6-33).		X
Storage.Edit	If you enable this option, the user is allowed to edit an existing storage location (see page 6-35).		X
Storage.Delete	If you enable this option, the user is allowed to delete a storage location (see page 6-37).		X
Storage.Reserve	If you enable this option, the user is allowed to reserve a storage location (see page 6-39).	X	X

Feature	Description	Defaults Rights for Roles	
		pcmrequestor	pcmadmin
Storage.Block	If you enable this option, the user is allowed to block or unblock a storage location (see page 6-38).		X
RESERVATION RIGHTS			
Reservation.Read	If you enable this option, the user is allowed to view information about reservations (see page 10-38).	X	X
Reservation.Create	If you enable this option, the user is allowed to create reservations (see page 10-33).	X	X
Reservation.Edit	If you enable this option, the user is allowed to edit reservations (see page 10-34).		X
Reservation.Delete	If you enable this option, the user is allowed to delete reservations (see page 10-35).		X
Reservation.Process	If you enable this option, the user is allowed to process reservations by modifying the status of request items (for example, from “Checked out” to “Returned”) (see page 10-41).		X
BARCODE RIGHTS			
Barcode.Process	If you enable this option, the user is allowed to process barcode files (see chapter 8).		X

Feature	Description	Defaults Rights for Roles	
		pcmrequestor	pcmadmin
ADMINISTRATION RIGHTS			
Admin.Manager	If you enable this option, the user can access all of Physical Content Manager's administrative functions such as configuring the application (see page 5-2), defining custom metadata fields (see page 5-79), configuring location types (see page 5-40), configuring object types (see page 5-56), configuring media types (see page 5-66), printing user labels (see page 9-3), and accessing request reports (see page 10-32).		X
Admin.LocationTypes	If you enable this option, the user is allowed to configure location types (see page 5-40) (providing that user also has the Admin.Manager right).		X
Admin.PrintLabel	If you enable this option, the user is allowed to generate labels for users, storage locations, or individual physical items (see chapter 9).		X

SETTING RIGHTS FOR ROLES

Rights define what actions users are allowed to perform on content items. To assign rights to user roles, complete the following steps:

1. Log into the content server as a system administrator.
2. Open the **Administration** tray or top menu.
3. Click **Admin Applets**.

The Administration Applets page for your server is displayed.

4. Click the **User Admin** icon.

The User Admin utility starts.

5. Choose **Security—Permissions by Role** from the menu.

The Permissions by Role dialog is displayed.

6. Select the role whose Physical Content Manager rights you want to review or modify, and click **Edit ECM Rights**.

The [Edit ECM Rights Dialog](#) (page 4-9) is displayed.

7. Open the appropriate tab (**PCM** or **CBC**).
8. Set the appropriate [rights](#) by selecting or clearing the associated check boxes (see page 4-9). Click **OK** when you are done.
9. Click **Close** to exit the Permissions by Role dialog.
10. Close the User Admin utility.



Note: The content server does not need to be restarted for the changes to take effect.

CONFIGURING PHYSICAL CONTENT MANAGER

OVERVIEW

This section is for content administrators who are responsible for configuring Physical Content Manager (generally those with the 'pcmadmin' role). It covers the following topics:

- ❖ [Configuring Physical Content Management Settings](#) (page 5-2)
- ❖ [Configuring Chargebacks](#) (page 5-11)
- ❖ [Configuring Location Types](#) (page 5-40)
- ❖ [Configuring Object Types](#) (page 5-56)
- ❖ [Configuring Media Types](#) (page 5-66)
- ❖ [Configuring Default Reservation Metadata Values](#) (page 5-76)
- ❖ [Configuring Custom Metadata Fields](#) (page 5-79)
- ❖ [Creating Disposition Rules for Physical Content](#) (page 5-88)
- ❖ [Specifying Barcode Values for Users](#) (page 5-88)



Note: For information on security, refer to [Chapter 4 \(Physical Content Manager Security\)](#). For information on setting up the storage space environment, refer to [Chapter 6 \(Setting Up Storage Space\)](#).

CONFIGURING PHYSICAL CONTENT MANAGEMENT SETTINGS

A number of system-wide configuration settings for the physical content management environment are specified on the Physical Content Management page (see Figure 5-2 below).



Note: You must have the PCM.Admin.Manager [right](#) to access the Configure Physical Content Management page. By default, this right is assigned to the predefined ‘pcmadmin’ role.

To access the Configure Physical Content Management page, complete the following steps:

1. Log into the content server as a records administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

Figure 5-2 Configure Physical Content Management page

Configure Physical Content Management

Configuration Requests Process Barcode File Reports Batch Services

Report Label Format: Adobe Acrobat

Default Transfer Method: Pickup

Default Request Priority: No Priority

Default Checkout Period (days): 30

Delete completed requests

Request History Period (days):

Check in internal content item for reservation workflow

Update internal content item for reservation workflow

Do not notify users when checked-out items are overdue

Allow reservation requestors to modify/delete their reservations


Automatically update request waiting list

Show batch services

Submit Update Reset Quick Help

Page Features

The table below describes the various features of the Configure Physical Content Manager page.

Feature	Description
Report Label Format	<p>Specifies the file format that report labels (such as user labels and storage labels) should be output to. There are two options:</p> <ul style="list-style-type: none"> • Adobe Acrobat (PDF files; initial default)—This is the PDF format, which is widely used as a platform-independent, printer-independent file format for documents. • PCM Reports (PLB and PRT files)—These are XML-based, plain-text data files created by Physical Content Manager. PLB files are used for labels and PRT files for reports. These formats can be viewed and printed using the optional Print Report Utility, which can be installed from the PCM distribution media and also from <code>[CS_Instance_Dir]/custom/PhysicalContentManager/Client</code>. For further details on this utility, refer to Appendix A (Using the Print Report Utility). <p> Note: Generated PDF files cannot be viewed using Adobe Acrobat 5.x or earlier. You need at least version 6.0 of the Acrobat software.</p>

Feature	Description
Default Transfer Method	<p>Specifies the default transfer method for reserved physical items. The following options are available:</p> <ul style="list-style-type: none"> • Copy—This means that the physical content item will be duplicated, and the copy will be provided to the requestor. The copy can be physical (for example, a document run through a copier or a copied DVD) or electronic (for example, a scanned document or an ISO image of a CD). • Fax—This means that the physical content item will be faxed to its intended recipient. • Mail—This means that the original physical content item will be mailed to its intended recipient. • Pickup (initial default)—This means that the intended recipient will pick up the physical content item in person. • Email—This means that the content item will be e-mailed to its intended recipient.

Feature	Description
Default Request Priority	<p>Specifies the default request priority for reserved physical content items. The following options are available:</p> <ul style="list-style-type: none"> • No Priority (initial default)—This means that delivery of the requested item does not have any particular priority (i.e., there is no rush). The item can be delivered in accordance with the applicable fulfillment procedures. • ASAP Rush—This means that the requested item should be delivered to its intended recipient as soon as possible after the reservation was made. • This Morning—This means that the requested item should be delivered to its intended recipient the same morning that the reservation was made. • Today—This means that the requested item should be delivered to its intended recipient the same day that the reservation was made. • This Week—This means that the requested item should be delivered to its intended recipient the same week that the reservation was made.
Default Checkout Period (days)	<p>Specifies the number of days that a reserved physical item may be checked out by default. As an administrator, you can override this default value when processing a reservation.</p> <p>The default number of days is 30.</p>
Delete completed requests	<p>Specifies whether fulfilled reservation requests are automatically deleted from the reservations history after the defined number of days (see next item).</p> <p>A reservation request is considered completed if none of its request items are still pending (in process), on a waiting list, or checked out—in other words, they are returned, denied, not found, unavailable, or cancelled.</p> <p>❖ Initial default: disabled.</p>

Feature	Description
Request History Period (days)	<p>This option is available only if the “Delete completed requests” check box is selected (see previous item). It specifies the maximum number of days that a reservation request is stored in a reservations history. This may be useful for logging or tracking purposes. After the request exceeds the maximum specified age, it is automatically deleted from the reservations history.</p>
Check in internal content item for reservation workflow	<p>Specifies whether a new, internal content item is checked into the content server when someone makes a reservation request for a physical item. This internal content item subsequently goes through the standard reservations workflow, which is used for approval and notification purposes (see page 10-5).</p> <p>If you clear this check box, users can still make reservations, but no-one will receive any e-mail notifications about them (not even the system administrator).</p> <p>❖ Initial default: enabled.</p>
Update internal content item for reservation workflow	<p>This option is available only if the “Check in internal content item for reservation workflow” check box is selected. It specifies whether a new revision of the checked-in content item for a reservation request is created when someone modifies that reservation request (for example, by changing its delivery method). This updated content item subsequently goes through the standard reservations workflow, which is used for approval and notification purposes (see page 10-5).</p> <p>If you clear this check box, no-one will receive any e-mail notifications about the reservation change (not even the system administrator).</p> <p>❖ Initial default: disabled.</p>
Do not notify users when checked-out items are overdue	<p>Specifies whether users who have checked out a reservation item will receive an e-mail notification if that item is past its due date.</p>

Feature	Description
<p>Allow reservation requestors to modify/delete their reservations</p>	<p>Specifies whether users that create a reservation request are allowed to modify or delete their own open reservation requests, even if they do not have the <code>PCM.Reservation.Delete</code> and/or <code>PCM.Reservation.Edit</code> rights. If users do have these rights, this option does not change anything for them.</p> <p>If this option is enabled, users that create a reservation request can edit the metadata for their own reservations and request items. They cannot edit the status of a request item, but they are able to cancel the item. In addition, they can delete their own reservations and request items.</p> <p>❖ Initial default: disabled.</p>
<p>Automatically update request waiting list</p>	<p>Specifies whether waiting lists for requests are updated automatically or whether the administrator should do this manually.</p> <p>With this check box selected, when a reserved item is returned (and marked as such), the waiting list for this item, if any, is updated automatically to change the reservation status for the next requestor on the list from “Waiting List” to “In Process.”</p> <p>If this check box is cleared, the administrator needs to manually do this on any of the reservation pages.</p> <p>❖ Initial default: enabled.</p>
<p>Show batch services</p>	<p>Specifies whether the batch services for Physical Content Manager are available in the External Content menu (see page 3-3). These services enable system administrators to run scheduled tasks immediately rather than wait for the standard scheduled time (once a day at midnight).</p> <p>❖ Initial default: disabled.</p>

Feature	Description
Submit Update button	Click this button to submit your updated configuration settings.
Reset button	Click this button to return the page to its initial default settings.
Quick Help button	Click this button to display context-sensitive help information about this page.

Menu Bar

The Configure Physical Content node may contain any of the following menu items, depending on a user's assigned rights:

- ❖ **Configuration**—This menu has the following options:
 - **Batch Storage Creation**
Choose this option to create a storage space definition file that can be imported into Physical Content Manager to add a new storage space to an existing environment. See [Create Batch Storage Import File Page](#) (page 6-24) for further details.
 - **Chargebacks**
Choose this option to configure a number of settings and perform tasks related to chargebacks. See [Configuring Chargebacks](#) (page 5-11) for further details.
 - **Location Types**
Choose this option to configure the types of location that can be used to store external, physical content. See [Configuring Location Types](#) (page 5-40) for further details.
 - **Object Types**
Choose this option to configure the object types for storage locations. See [Configuring Object Types](#) (page 5-56) for further details.
 - **Media Types**
Choose this option to configure the media types for storage locations. See [Configuring Media Types](#) (page 5-66) for further details.
 - **Storage**
Choose this option to set up the storage environment for physical items. See [Chapter 6 \(Setting Up Storage Space\)](#) for further details.

- **Custom Metadata**
Choose this option to set up custom metadata fields that your organization needs for external, physical content. See [Configuring Custom Metadata Fields](#) (page 5-79) for further details.
- **Reservation Default Metadata**
Choose this option to configure the default metadata values for reservations for physical items that are checked into the content server. See [Configuring Default Reservation Metadata Values](#) (page 5-76) for further details.
- ❖ **Requests**—This menu has the following options:
 - **All pending requests**
Choose this option to display a list of all reservation requests that are currently being processed.
 - **All checked-out requests**
Choose this option to display a list of all reservation requests for which the physical content items are checked out (waiting to be returned).
 - **All overdue requests**
Choose this option to display a list of all reservation requests for which the checked-out physical content items are past their return due date.
- ❖ **Process Barcode File**
Choose this option to import the data of a barcode file generated by a barcode scanner into the content server. See [Chapter 8 \(Working With Barcodes\)](#) for further details.
- ❖ **Reports**—This menu has the following options:
 - **Scheduled PCM reports**
Choose this option to view all scheduled PCM reports.
 - **Print User Labels**
Choose this option to generate a file with barcodes for a specific user or all users in the system. The file format depends on the Report Label Format setting on the [Configure Physical Content Management page](#) (see page 5-2). See [User Labels](#) (page 9-3) for further details.
- ❖ **Batch Services**—This opens a submenu that contains a number of physical content management services that can be performed. These enable system administrators to run certain tasks immediately rather than wait for the standard scheduled time (once a day at midnight). The following services are available:
 - **Process Storage Space Counts**
Choose this option to immediately recalculate the occupied space in the storage locations (i.e., update the Spaces Available and Spaces Used fields on the

exploring pages) rather than wait for the scheduled daily update to occur. This enables you to update the space availability numbers on the [Storage Information pages](#) (see page 6-30).

- **Process Overdue Requests**
Choose this option to immediately check all checked-out, reserved items that are past their return due date.
- **Notify Requestors of Overdue Requests**
Choose this option to immediately notify send e-mail notifications to those users with with items out that are past their return due date.
- **Delete Completed Reservations**
This option is available only if the “Delete completed requests” check box on the [Configure Physical Content Manager page](#) (see page 5-2) is selected. Choose it to immediately delete all reservation requests that were successfully completed before the defined reservation history cut-off. The timeframe during which reservation requests are saved is defined on the [Configure Physical Content Manager page](#). A reservation request is considered completed if none of its request items are still pending (in process), on a waiting list, or checked out—in other words, they are returned, denied, not found, unavailable, or cancelled.
- **Update Users with no Barcodes**
Choose this option to set the barcode values for users that currently do not have a barcode value in their User Admin properties. This is useful for all users that were already defined when the Physical Content Manager software was installed. The barcode values are set to the user login names in all upper-case letters. For example, the value for a user with login ‘jsmith’ is set to ‘JSMITH’. If the user login name contains accented letters (for example, ‘kmüller’), then they are represented as hexadecimal values (for example, ‘KMC39CLLER’). The barcode values are used for [user labels](#) (see page 9-3).



Note: The Batch Services option is only displayed if the corresponding option on the [Configure Physical Content Manager page](#) is enabled (see page 5-2).

Menu Item Availability

The menu items available to users depend on the [rights](#) that they have been assigned. A content administrator with all access rights (typically assigned the predefined ‘pcmadmin’ [role](#)) will see all administrator menus. Other users (for example, those assigned the default ‘pcmrequestor’ [role](#)) may see a much smaller subset of the administrator menus, depending on their assigned rights.



Note: For more information about Physical Content Manager rights and roles, refer to [Chapter 4 \(Physical Content Manager Security\)](#).

CONFIGURING CHARGEBACKS

This section covers the following topics:

Concepts

- ❖ [About Chargebacks](#) (page 5-12)
- ❖ [Predefined Charge Actions](#) (page 5-13)
- ❖ [Predefined Payment Types](#) (page 5-14)

Interface

- ❖ [Configure Chargebacks Page](#) (page 5-14)
- ❖ [Configure Charge Type Page](#) (page 5-16)
- ❖ [Create/Edit Charge Type Page](#) (page 5-17)
- ❖ [Charge Type Information Page](#) (page 5-20)
- ❖ [Select Object Type Page](#) (page 5-21)
- ❖ [Select Media Type Page](#) (page 5-22)
- ❖ [Configure Payment Types Page](#) (page 5-23)
- ❖ [Create/Edit Payment Types Page](#) (page 5-24)
- ❖ [Payment Type Information Page](#) (page 5-26)
- ❖ [Configure Billers Page](#) (page 5-27)
- ❖ [Create/Edit Biller Page](#) (page 5-28)
- ❖ [Biller Information Page](#) (page 5-31)

Tasks

- ❖ [Creating a Charge Type](#) (page 5-32)
- ❖ [Editing a Charge Type](#) (page 5-33)
- ❖ [Viewing a Charge Type](#) (page 5-33)
- ❖ [Deleting a Charge Type](#) (page 5-34)
- ❖ [Creating a Payment Type](#) (page 5-35)
- ❖ [Editing a Payment Type](#) (page 5-35)
- ❖ [Viewing a Payment Type](#) (page 5-36)
- ❖ [Deleting a Payment Type](#) (page 5-37)
- ❖ [Creating a Biller](#) (page 5-37)
- ❖ [Editing a Biller](#) (page 5-38)
- ❖ [Viewing a Biller](#) (page 5-39)
- ❖ [Deleting a Biller](#) (page 5-39)

About Chargebacks

Chargebacks are fees that are charged to people or businesses for the use of storage facilities or actions performed on physical items in the storage facilities. The Physical Content Manager application enables you to generate invoices for the storage, use, reservation, and destruction of the managed content. These invoices can then be sent to the internal or external customers in accordance with the applicable business procedures.

The system administrator sets up charge types (billable events), payment types (methods of payment), and billers (users or organizations that will be billed). Once set up, each billable action (creation, reservation, storage, destruction) can be transacted to a particular biller by creating invoices which contain one or more transactions on physical items that have occurred for these billers.

A **charge type** is a defined transaction that is triggered by certain criteria. For example, creation of a physical item of object type “Box” and media type “Paper” may cost, say, \$5 per occurrence, while reservation of an item with priority “ASAP Rush” may cost \$20. Every time someone performs an action that meets the criteria of a charge type, a billable transaction is recorded for the associated user or organization (biller). The system will always use the charge type that is most specific—in other words, if charge type A has two criteria and charge type B has the same two criteria plus another one, it will be charge type

B that is recorded for a transaction that meets all three criteria of charge type B (even though it also meets the two criteria of charge type A).

Each charge type has an amount of money associated with it, which can be per record or for a specific period of time. For example, you could charge a fee every time a physical item is created (or reserved or destroyed), or you could charge a monthly fee to store a physical item.

A **payment type** specifies how internal or external customers pay for the services rendered. There are three predefined payment types (credit card, check, and invoice), but you can also create custom payment types.

Billers are internal or external users or organizations that are charged for the services rendered on physical items. They will receive the invoices generated by Physical Content Manager (in accordance with the applicable business procedures) and make the payments for the chargebacks.

Once the charge types, payment types, and billers are defined, they can be used to create invoices to submit to the different billers for each billable event (transaction). These invoices can be run on an as-needed basis or they can be scheduled automatically in accordance with defined criteria.



Note: You must have the PCM.Admin.Manager [right](#) to work with chargebacks. By default, this right is assigned to the predefined 'pcmadmin' role. In addition, the chargeback feature has its own [set of rights](#) which define what users can do in this area (see page 4-11).

Predefined Charge Actions

The out-of-the-box Physical Content Manager application comes with the following predefined charge actions:

- ❖ **Creation**—This means that a user is billed if a physical item is created (i.e., assigned to a location in the storage environment).
- ❖ **Destruction**—This means that a user is billed if a physical item is destroyed.
- ❖ **Reservation**—This means that a user is billed if a reservation request is made for a physical item.
- ❖ **Storage**—This means that a user is billed if a physical item is stored.

Predefined Payment Types

The out-of-the-box Physical Content Manager application comes with the following predefined payment types:

- ❖ **Credit Card**—To charge a biller paying via a credit card.
- ❖ **Check**—To charge a biller paying via check.
- ❖ **Invoice**—To charge a biller by submitting an invoice to them.

Configure Chargebacks Page



Note: You must have the `PCM.Admin.Manager` *and* `PCM.Admin.LocationTypes` [rights](#) to access the Configure Chargebacks page. By default, this right is assigned to the predefined 'pcmadmin' role.

Use the Configure Chargebacks page to set up the chargeback functionality in Physical Content Manager. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

Figure 5-3 Chargebacks configuration page

Configure Chargebacks

▼ Configure ▼ Browse Add Transaction Screen Charges

Enable Automatic Processing of Creation Charges

Enable Automatic Processing of Destruction Charges

Enable Automatic Processing of Reservation Charges

Submit Update Reset Quick Help

Page Features

The table below describes the various features of the Configure Chargebacks page.

Feature	Description
Enable Automatic Processing of Creation Charges	Select this check box if you want Physical Content to automatically create transactions for creating physical items. If you do not enable this option, you need to create transactions manually for billable creation events. See Chapter 11 (Working With Chargebacks) for more information.
Enable Automatic Processing of Destruction Charges	Select this check box if you want Physical Content to automatically create transactions for destroying physical items. If you do not enable this option, you need to create transactions manually for billable destruction events. See Chapter 11 (Working With Chargebacks) for more information.
Enable Automatic Processing of Reservation Charges	Select this check box if you want Physical Content to automatically create transactions for reserving physical items. If you do not enable this option, you need to create transactions manually for billable reservation events. See Chapter 11 (Working With Chargebacks) for more information.
Submit Update button	Click this button to submit your updated location type definitions.
Reset	Click this button to clear all changes made since loading the page.
Quick Help button	Click this button to display context-specific help information about this page.

Menu Bar

A menu bar is available to users with the right permission level. The following configuration options are available in the **Configure** menu:

- ❖ **Configure Charge Types**—Click this option to open the [Configure Charge Type Page](#) (page 5-16).

- ❖ **Configure Payment Types**—Click this option to open the [Configure Payment Types Page](#) (page 5-23).
- ❖ **Configure Billers**—Click this option to open the [Configure Billers Page](#) (page 5-27).



Note: See [Chapter 11 \(Working With Chargebacks\)](#) for more information on the other items on the menu bar.

Configure Charge Type Page



Note: You must have the `PCM.Admin.Manager` *and* `CBC.ChargeBacks.Admin` rights access this page. By default, this right is assigned to the predefined ‘pcmadmin’ role.

Use the Configure Charge Type page to view all defined charge types. You can also add and delete charge types from this page. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Click **Configure—Configure Charge Types**.

Figure 5-4 Configure Charge Types page

Delete	Charge Type ID	Add
<input type="checkbox"/>	Basic Monthly Sotrage	
<input type="checkbox"/>	Media Reservation	
<input type="checkbox"/>	MonthlyBillingMedis	
<input type="checkbox"/>	Storage Reservation	


This page lists all defined charge types.



Note: The system will always use the charge type that is most specific—in other words, if charge type A has two criteria and charge type B has the same two criteria plus another one, it will be charge type B that is recorded for a transaction that meets all three criteria of charge type B (even though it also meets the two criteria of charge type A).

Page Features

The table below describes the various features of the Configure Charge Type page.

Feature	Description
Delete	Check the box to mark the invoice for deletion.
Charge Type ID	Name of the charge type.
Actions menu icon ()	If you click on this icon, a popup menu is displayed with the following options (depending on your assigned rights): <ul style="list-style-type: none"> ❖ Edit Charge Type—Choose this option to display the information to the selected invoice. ❖ Delete Charge Type—Choose this option to display the individual transactions for the invoice.

Create/Edit Charge Type Page

Create Charge Type Page

Use the Create Charge Type page to define a new charge type. To access this page, complete the following steps:



Note: You must have the `PCM.Admin.Manager` *and* `CBC.ChargeBacks.Admin` *and* `CBC.ChargeBacks.Create` [rights](#) to access this page. By default, this right is assigned to the predefined ‘pcmadmin’ role.

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.
The [Configure Chargebacks Page](#) (page 5-14) is displayed.
5. Select **Configure—Charge Types**.
[Configure Charge Type Page](#) (page 5-16) is displayed.
6. Click **Add**.

Figure 5-5 Create Charge Type page

Edit Charge Type Page

Use the Edit Charge Type page to modify the properties of an existing charge type. To access this page, complete the following steps:



Note: You must have the `PCM.Admin.Manager` *and* `CBC.ChargeBacks.Admin` *and* `CBC.ChargeBacks.Edit` rights to access this page. By default, this right is assigned to the predefined 'pcmadmin' role.

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.
The [Configure Physical Content Management page](#) is displayed (see page 5-2).
4. Choose **Configure—Chargebacks**.
The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Select **Configure—Charge Types**.
6. In the list of existing charge types, select the item you want to edit, and click **Edit Charge Type** in the action icon menu (🔗).

Page Features

The table below describes the various features of the Create Charge Type and Edit Charge Type pages.

Feature	Description
Charge Type ID	Enter a unique identifier for the charge type. <ul style="list-style-type: none"> ❖ Required. ❖ Maximum number of characters: 30. This field is view-only on the Edit Charge Type page.
Description	Enter a brief description for the charge type. <ul style="list-style-type: none"> ❖ Required. ❖ Maximum number of characters: 60.
Action	Enter the action of the charge type. It will be either Creation, Destruction, Reservation, or Storage. <ul style="list-style-type: none"> ❖ Required.
Charge Amount	Enter the amount of the charge, on Dollars and Cents. In the drop-down box, select if the charge is per record or per period.
Frequency	Enter the frequency of the storage period. This is available only when the Action is set to 'Storage'.
Object Types	Use the Browse button, select the appropriate object type(s) that should trigger this charge type. If you click the Browse button, the Select Object Type Page (page 5-21) is displayed. See Predefined Object Types (page 5-57) for more information.

Feature	Description
Media Types	Using the Browse button, select the media type(s) that should trigger charge type. If you click the Browse button, the Select Media Type Page (page 5-22) is displayed. See Predefined Media Types (page 5-67) for more information.
Transfer Methods	Select the transfer method of reservations that should trigger the charge type. This field is only available for reservations. See Transfer Method (page 10-8) for further details.
Priorities	Select the transfer method of reservations that should trigger the charge type. This field is only available for reservations. See Priority (page 10-8) for further details.



Note: The system will always use the charge type that is most specific—in other words, if charge type A has two criteria and charge type B has the same two criteria plus another one, it will be charge type B that is recorded for a transaction that meets all three criteria of charge type B (even though it also meets the two criteria of charge type A).

Charge Type Information Page



Note: You must have the `PCM.Admin.Manager` *and* `CBC.ChargeBacks.Admin` *and* `CBC.ChargeBacks.Read` [rights](#) to access this page. By default, this right is assigned to the predefined ‘pcadmin’ role.

Use the Charge Type Information page to view the properties of an existing charge type. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Select **Configure—Charge Types**.
6. In the list of charge types, select the item whose properties you want to see, and click the info icon (i).

Figure 5-6 Charge Type Information page

The screenshot shows a web interface titled "Charge Type Information". At the top right, there are "Edit" and "Delete" buttons. The main content area lists the following properties for a selected charge type:

- Charge Type ID:** Media Reservation
- Description:** Reservation charge for Media
- Action:** Reservation
- Charge Amount:** \$0.50 Per Record
- Frequency:**
- Object Types:** Box, Document, Folder, Micro, Optical, Tape
- Media Types:** Audio, Box, CD, Data, Disc, Dvd, Fax, Folder, Microfiche, Microfilm, Mixed, Paper, Photo, Visual
- Transfer Methods:** wwMail, wwPickup, wwEmail, Deliver
- Priorities:** wwNoPriority, wwASAPRush, wwThisMorning, wwToday, wwThisWeek

This page shows the current properties of the selected charge type. Only the fields that contain information are displayed.

Menu Bar

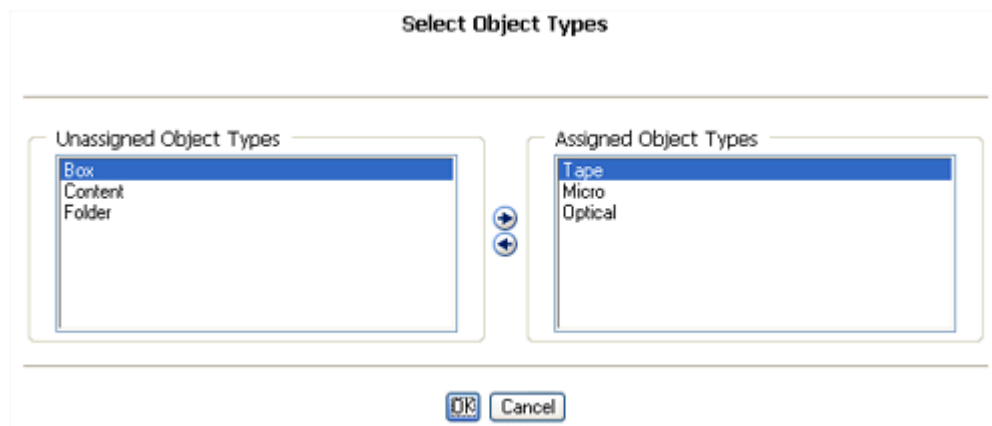
Depending on your assigned rights, there may be the following options in the menu bar at the top of the page:

- ❖ **Edit**—Choose this option to edit the current charge type (see page 5-33).
- ❖ **Delete**—Choose this option to delete the current charge type (see page 5-34).

Select Object Type Page

The Select Object Type page is displayed when you create or edit a charge type, either by pressing 'Add' on the [Configure Charge Type Page](#) (page 5-16) or 'Edit' on the [Charge Type Information Page](#) (page 5-20).

Figure 5-7 Select Object Types pop-up



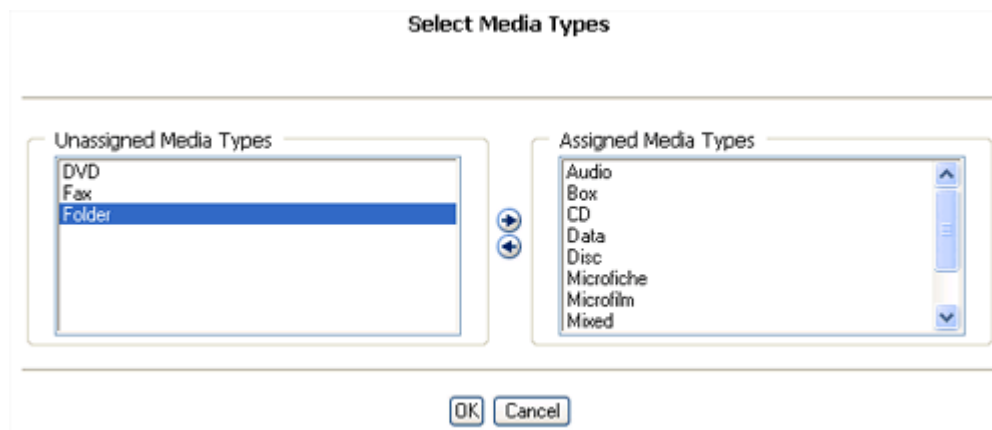
An object type is the type of storage container for the media it can hold. The particular media types that can be contained in an object type are defined by the administrator. An object type can hold any combination of media types when configured to do so.

The Select Object Type page is used to select the particular object types that have already been defined to be used for the selected charge type. Select an object type by highlighting it in the Unassigned Object Types list and press the right arrow (➡) to move it to the Assigned Object Types. To remove an object, select it in the Assigned Object Types window and press the left arrow (⬅).

The boxes list all defined object types. See [Configuring Object Types](#) (page 5-56) for more information.

Select Media Type Page

The Select Media Type page is displayed when creating or editing a Charge Type, either by pressing 'Add' on the [Configure Charge Type Page](#) (page 5-16) or 'Edit' on the [Charge Type Information Page](#) (page 5-20).

Figure 5-8 Select Media Types pop-up

A media type is the material that the data being stored is physically contained on. Media types are contained within object types. Object types can be defined to hold any media type, or multiple types of media, including all possible types of media.

The Select Media Type page is used to select the particular media types that have already been defined to be used for the selected charge type. Select a media type by highlighting it in the Unassigned Media Types list and press the right arrow (➔) to move it to the Assigned Media Types. To remove an object, select it in the Assigned Media Types window and press the left arrow (➠).

The boxes list all defined media types. See [Configuring Media Types](#) (page 5-66) for more information.

Configure Payment Types Page



Note: You must have the `PCM.Admin.Manager` *and* `CBC.ChargeBacks.Admin` [rights](#) access this page. By default, this right is assigned to the predefined 'pcadmin' role.

Use the Configure Payment Type page to view all defined payment types. You can also add and delete payment types from this page. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

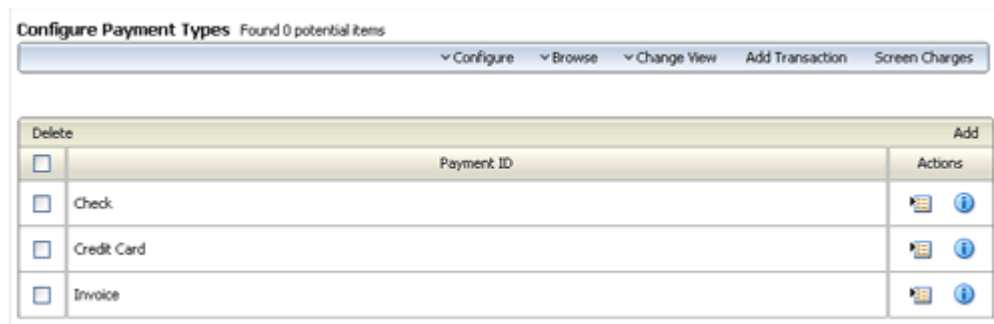
The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Select **Configure—Payment Types**.

Figure 5-9 Configure Payment Types page



Create/Edit Payment Types Page

Create Payment Type Page

Use the Create Payment Types page to create and define the properties of an existing payment type. To access this page, complete the following steps:



Note: You must have the `PCM.Admin.Manager` *and* `CBC.ChargeBacks.Admin` *and* `CBC.ChargeBacks.Create` [rights](#) to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Select **Configure—Payments**.

The [Configure Payment Types Page](#) (page 5-23) is displayed.

6. In the top bar of the list of existing payment types, click **Add**.

Figure 5-10 Create Payment Type

Edit Payment Type Page

Use the Create Payment Types page to create and define the properties of an existing payment type. To access this page, complete the following steps:



Note: You must have the PCM.Admin.Manager *and* CBC.ChargeBacks.Admin *and* CBC.ChargeBacks.Edit **rights** to access this page. By default, this right is assigned to the predefined 'pcmadmin' role.

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Select **Configure—Payments**.

The [Configure Payment Types Page](#) (page 5-23) is displayed.

6. In the list of payment types, select the item whose properties you want to see, and click the info icon (.

The [Payment Type Information Page](#) (page 5-26) page is displayed

7. In the titlebar, click **Edit**.

Page Features

The table below describes the various features of the Create Payment Type and Edit Payment Type pages.

Feature	Description
Payment ID	<p>Enter a unique identifier for the payment type. This is the name that is displayed in the location type hierarchy (see page 5-43).</p> <ul style="list-style-type: none"> ❖ Required. ❖ Maximum number of characters: 30. <p>This field is view-only on the Edit Payment Type page.</p>
Description	<p>Enter a brief description for the payment type.</p> <ul style="list-style-type: none"> ❖ Required. ❖ Maximum number of characters: 60.

Payment Type Information Page



Note: You must have the PCM.Admin.Manager *and* CBC.ChargeBacks.Admin *and* CBC.ChargeBacks.Read [rights](#) to access this page. By default, this right is assigned to the predefined 'pcadmin' role.

Use the Payment Type Information page to view the properties of an existing payment type. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.
The [Configure Physical Content Management page](#) is displayed (see page 5-2).
4. Choose **Configure—Chargebacks**.
The [Configure Chargebacks Page](#) (page 5-14) is displayed.
5. Select **Configure—Configure Payment Types**.
The [Configure Payment Types Page](#) (page 5-23) is displayed.

- In the list of payment types, select the item whose properties you want to see, and click the info icon (i).

Figure 5-11 Payment Type Information page



This page shows the current properties of the selected payment type.

Menu Bar

Depending on your assigned rights, there may be the following options in the titlebar in top-right corner of the page:

- ❖ **Edit**—Choose this option to edit the current payment type (see page 5-35).
- ❖ **Delete**—Choose this option to delete the current payment type (see page 5-37).

Configure Billers Page



Note: You must have the `PCM.Admin.Manager` *and* `CBC.ChargeBacks.Admin` rights access this page. By default, this right is assigned to the predefined 'pcmadmin' role.

Use the Configure Billers page to view all defined billers. You can also add and delete billers from this page. To access this page, complete the following steps:

- Log into the content server as an administrator.
- Open the **External Content** tray or top menu.
- Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

- Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

- Select **Configure—Configure Billers**.

The [Configure Billers Page](#) (page 5-27) is displayed.

Figure 5-12 Configure Billers page

Delete	Biller ID	Actions
<input type="checkbox"/>	Accounting_001	
<input type="checkbox"/>	Accounting_002	
<input type="checkbox"/>	Facilities Management	
<input type="checkbox"/>	Manufacturing Procedures	

Create/Edit Biller Page

Create Biller

Use the Create Biller page to define the properties of a biller. To access this page, complete the following steps:



Note: You must have the PCM.Admin.Manager *and* CBC.ChargeBacks.Admin *and* CBC.ChargeBacks.Create [rights](#) to access this page. By default, this right is assigned to the predefined 'pcmadmin' role.

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Select **Configure—Configure Billers**.

The [Configure Billers Page](#) (page 5-27) is displayed.

6. Click **Add**.

Figure 5-13 Create Biller page

Create Biller

Biller ID

Name

Address 1

Address 2

City

State

Postal Code

Country

Phone

Email

Is Active

Edit Biller

Use the Edit Biller page to modify the properties of an existing biller. To access this page, complete the following steps:



Note: You must have the `PCM.Admin.Manager` *and* `CBC.ChargeBacks.Admin` *and* `CBC.ChargeBacks.Edit` rights to access this page. By default, this right is assigned to the predefined 'pcmadmin' role.

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Select **Configure—Configure Billers**.

The [Configure Billers Page](#) (page 5-27) is displayed.

6. In the list of billers, select the item whose properties you want to see, and click the info icon ().

The [Biller Information Page](#) (page 5-31) is displayed.

7. Click **Edit**.

Page Features

The table below describes the various features of the Create Biller and Edit Biller pages. Information that is not entered will not appear on the Information page.

Feature	Description
Biller ID	Enter a unique identifier for the group being billed. This is the name that is displayed in the location type hierarchy (see page 5-43). ❖ Required. ❖ Maximum number of characters: 30. This field is view-only on the Edit Location Type page.
Description	Enter a brief description for the biller. ❖ Required. ❖ Maximum number of characters: 60.
Address 1	Enter the address of the Billing group, if desired.
Address 2	Enter additional address information of the Billing group, if desired.
City	Enter the city for the biller.
State	Enter the state for the biller
Postal Code	Usign the 'Browse' button, select the appropriate object types for this chargeback. When the browse button is pressed, the Select Object Types window pops up.
Country	Enter the country for the biller.
Phone	Enter the phone number for the biller.

Feature	Description
Is Active	Enter if the Biller is still active, or if they are no longer active. ❖ Required

Biller Information Page



Note: You must have the PCM.Admin.Manager *and* CBC.ChargeBacks.Admin *and* CBC.ChargeBacks.Read *rights* to access this page. By default, this right is assigned to the predefined ‘pcmadmin’ role.

Use the Location Type Information page to view the properties of an existing location type. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.
The [Configure Physical Content Management page](#) is displayed (see page 5-2).
4. Choose **Configure—Chargebacks**.
The [Configure Chargebacks Page](#) (page 5-14) is displayed.
5. Select **Configure—Configure Billers**.
The [Configure Billers Page](#) (page 5-27) is displayed.
6. In the list of billers, select the item whose properties you want to see, and click the info icon (i).

Figure 5-14 Charge Type Information page



This page shows the current properties of the selected location type. Only the fields that contain information, as well as the required fields, are displayed. For example, if no address has been specified for the biller, this field is not shown on the page.

Menu Bar

Depending on your assigned rights, there may be the following options in the titlebar in top-right corner of the page:

- ❖ **Edit**—Choose this option to edit the current biller (see page 5-38).
- ❖ **Delete**—Choose this option to delete the current biller (see page 5-39).

Creating a Charge Type

Use this procedure to create a new charge type that can be used for chargebacks.



Note: You must have the `PCM.Admin.Manager` *and* `CBC.ChargeBacks.Admin` *and* `CBC.ChargeBacks.Create` rights to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To create a charge type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Select **Configure—Charge Types**.

The [Configure Charge Type Page](#) (page 5-16) is displayed.

6. Click **Add**.

The [Create/Edit Charge Type Page](#) (page 5-17) is displayed.

7. Specify the properties of the charge type, and click **OK**.

The new charge type is now added to the bottom of the list on the [Configure Charge Type Page](#) (page 5-16).

Editing a Charge Type

Use this procedure to modify an existing charge type.



Note: You must have the PCM.Admin.Manager *and* CBC.ChargeBacks.Admin *and* CBC.ChargeBacks.Edit [rights](#) to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To edit a charge type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Select **Configure—Charge Types**.

The [Configure Charge Type Page](#) (page 5-16) is displayed.

6. In the list of existing charge types, select the item you want to edit, and click **Edit Charge Type** in the action icon menu ().

The [Create/Edit Charge Type Page](#) (page 5-17) is displayed.

7. Modify the properties of the charge type as required, and click **OK** when you are done.

Viewing a Charge Type

Use this procedure to view the properties of an existing charge type.



Note: You must have the PCM.Admin.Manager *and* CBC.ChargeBacks.Admin *and* CBC.ChargeBacks.Read [rights](#) to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To view a charge type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Select **Configure—Charge Types**.

The [Configure Charge Type Page](#) (page 5-16) is displayed.

6. In the list of charge types, select the item whose properties you want to see, and click the info icon ().

The [Charge Type Information Page](#) (page 5-20) is displayed, which lists all properties of the existing charge type.

Deleting a Charge Type

Use this procedure to delete an existing charge type.



Note: You must have the `PCM.Admin.Manager` *and* `CBC.ChargeBacks.Admin` *and* `CBC.ChargeBacks.Delete` *rights* to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To delete a charge type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Choose **Configure—Charge Types**.

The [Configure Charge Type Page](#) (page 5-16) is displayed.

6. In the list of existing charge types, select the item you want to edit, and click **Delete Charge Type** in the action icon menu (.

The charge type is deleted.

Creating a Payment Type

Use this procedure to create a new payment type that can be used for chargebacks.



Note: You must have the PCM.Admin.Manager *and* CBC.ChargeBacks.Admin *and* CBC.ChargeBacks.Create [rights](#) to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To create a charge type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Choose **Configure—Payment Types**.

The [Configure Payment Types Page](#) (page 5-23) is displayed.

6. Click **Add**.

The [Create/Edit Payment Types Page](#) (page 5-24) is displayed.

7. Specify the properties of the payment type, and click **OK**.

The new payment type is now added to the bottom of the list on the [Configure Payment Types Page](#) (page 5-23).

Editing a Payment Type

Use this procedure to modify an existing payment type.



Note: You must have the PCM.Admin.Manager *and* CBC.ChargeBacks.Admin *and* CBC.ChargeBacks.Edit [rights](#) to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To edit a payment type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Choose **Configure—Payment Types**.

The [Create/Edit Payment Types Page](#) (page 5-24) is displayed.

6. In the list of existing payment types, select the item you want to edit, and click **Edit Payment Type** in the action icon menu ().

The [Create/Edit Payment Types Page](#) (page 5-24) is displayed.

7. Modify the properties of the payment type as required, and click **OK** when you are done.

Viewing a Payment Type

Use this procedure to view the properties of an existing payment type.



Note: You must have the PCM.Admin.Manager *and* CBC.ChargeBacks.Admin *and* CBC.ChargeBacks.Read *rights* to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To view a payment type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Choose **Configure—Payment Types**.

The [Configure Payment Types Page](#) (page 5-23) is displayed.

6. In the list of payment types, select the item whose properties you want to see, and click the info icon ().

The [Payment Type Information Page](#) (page 5-26) is displayed, which lists all properties of the existing payment type.

Deleting a Payment Type

Use this procedure to delete an existing payment type.



Note: You must have the PCM.Admin.Manager *and* CBC.ChargeBacks.Admin *and* CBC.ChargeBacks.Delete *rights* to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To delete a payment type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Select **Configure—Payment Types**.

The [Configure Payment Types Page](#) (page 5-23) is displayed.

6. In the list of existing payment types, select the item you want to edit, and click **Delete Payment Type** in the action icon menu (.

The payment type is deleted.

Creating a Biller

Use this procedure to create a new biller that can be used for chargebacks.



Note: You must have the PCM.Admin.Manager *and* CBC.ChargeBacks.Admin *and* CBC.ChargeBacks.Create *rights* to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To create a charge type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Select **Configure—Billers**.

The [Configure Billers Page](#) (page 5-27) is displayed.

6. Click **Add**.

The [Create/Edit Biller Page](#) (page 5-28) is displayed.

7. Specify the properties of the biller, and click **OK**.

The new biller is now added to the bottom of the list on the [Configure Billers Page](#) (page 5-27).

Editing a Biller

Use this procedure to modify an existing biller.



Note: You must have the `PCM.Admin.Manager` *and* `CBC.ChargeBacks.Admin` *and* `CBC.ChargeBacks.Edit` [rights](#) to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To edit a biller, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Select **Configure—Billers**.

The [Configure Billers Page](#) (page 5-27) is displayed.

6. In the list of existing billers, select the item you want to edit, and click **Edit Biller** in the action icon menu (.

The [Create/Edit Biller Page](#) (page 5-28) is displayed.

7. Modify the properties of the biller as required, and click **OK** when you are done.

Viewing a Biller

Use this procedure to view the properties of an existing biller.



Note: You must have the PCM.Admin.Manager *and* CBC.ChargeBacks.Admin *and* CBC.ChargeBacks.Read *rights* to perform this task. By default, this right is assigned to the predefined 'pcadmin' role.

To view a biller, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Select **Configure—Billers**.

The [Configure Billers Page](#) (page 5-27) is displayed.

6. In the list of billers, select the item whose properties you want to see, and click the info icon ().

The [Biller Information Page](#) (page 5-31) is displayed, which lists all properties of the existing biller.

Deleting a Biller

Use this procedure to delete an existing biller.



Note: You must have the PCM.Admin.Manager *and* CBC.ChargeBacks.Admin *and* CBC.ChargeBacks.Delete *rights* to perform this task. By default, this right is assigned to the predefined 'pcadmin' role.

To delete a biller, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Select **Configure—Billers**.

The [Configure Billers Page](#) (page 5-27) is displayed.

6. In the list of existing billers, select the item you want to edit, and click **Delete Biller** in the action icon menu ().

The billers is deleted.

CONFIGURING LOCATION TYPES

This section covers the following topics:

Concepts

- ❖ [About Location Types](#) (page 5-41)
- ❖ [Predefined Location Types](#) (page 5-41)
- ❖ [Location Type Icons](#) (page 5-42)

Interface

- ❖ [Configure Location Types Page](#) (page 5-43)
- ❖ [Create/Edit Location Type Page](#) (page 5-45)
- ❖ [Location Type Information Page](#) (page 5-50)

Tasks

- ❖ [Creating a Location Type](#) (page 5-51)
- ❖ [Viewing Location Type Information](#) (page 5-52)
- ❖ [Editing a Location Type](#) (page 5-53)
- ❖ [Deleting a Location Type](#) (page 5-53)
- ❖ [Reordering Location Types](#) (page 5-54)

Examples

- ❖ [Example: Creating a Location Type](#) (page 5-55)

About Location Types

Location types are used in the definition of the storage space that holds the physical content. They represent the hierarchy of storage units where items can be stored.

The Physical Content Manager application uses the location types and their defined hierarchy to keep track of the locations of the managed external physical content.



Note: You must have the PCM.Admin.Manager [right](#) to set up location types. By default, this right is assigned to the predefined 'pcmadmin' role.





Important Considerations



Please note the following important considerations with regard to location types:

- ❖ Reordering location types does not affect any existing storage locations. You will need to remove the existing storage locations and rebuild the storage environment if you want it to match the reordered location types.

Predefined Location Types

The out-of-the-box Physical Content Manager application comes with the following six predefined location types (in hierarchical order), with their standard [icons](#) (see below) for the default Trays layout:

Predefined Location Types	Icon (large)	Allows Storage of Content (Default) (see note below)
Warehouse		No
Room		No
Row		No
Bay		No

Predefined Location Types	Icon (large)	Allows Storage of Content (Default) (see note below)
Shelf		No
Position		Yes



Important: These are the default settings, which can be modified. Whether a location type allows storage of content applies to that particular level only, not to any lower levels. For example, in the default hierarchy, shelves have a number of positions, each of which can hold content items, but no content items can be directly assigned to the shelf level (only to the positions on a shelf). This means that the location type ‘Shelf’ cannot store content, whereas the type ‘Position’ can.

These predefined location types are hierarchical: a warehouse consists of one or more rooms, a room consists of one or more rows, a row consists of one or more bays, etc.

Location Type Icons

Each defined location type can be assigned an icon image, which is used to indicate the location type of storage locations. The icons are located in `[CS_Instance]/weblayout/resources/layouts/[Layout_Name]/[Skin_Name]/Pcm_Icons`, and come in three varieties:

- ❖ **[Name]_lg.gif**—This is the large variety of the icon (32x32 pixels), which is used in the thumbnail view of the [exploring pages](#) (see page 6-12).
- ❖ **[Name]_sm_closed.gif**—This is the small variety of the icon (16x16 pixels), which is used to indicate the location types of storage locations in the [storage space tree view](#) (see page 6-10) in the Trays layout when the child tree below the storage location is collapsed or when there are no child storage locations.
- ❖ **[Name]_sm_open.gif**—This is the small variety of the icon (16x16 pixels), which is used to indicate the location types of storage locations in the [storage space hierarchy](#) (see page 6-10) when the child tree below the storage location is opened.



Note: The open and closed icons for the [predefined location types](#) are identical, but they do not need to be.

Adding Customized Icons

You can add your own, customized icon files to the image selection list for location types by copying three gif files with the above naming pattern) for each icon to the appropriate *Pcm_Icons* directories. For example, you could create icon files called *Storage_archive_lg.gif* (32x32 pixels), *Storage_archive_sm_open.gif* (16x16 pixels), and *Storage_archive_sm_closed.gif* (16x16 pixels), and copy these to `[CS_Instance]/weblayout/resources/layouts/Trays/[Skin_Name]/Pcm_Icons` to make them available in the default Trays layout.

Configure Location Types Page



Note: You must have the `PCM.Admin.Manager` *and* `PCM.Admin.LocationTypes` [rights](#) to access the Configure Location Types page. By default, this right is assigned to the predefined 'pcmadmin' role.

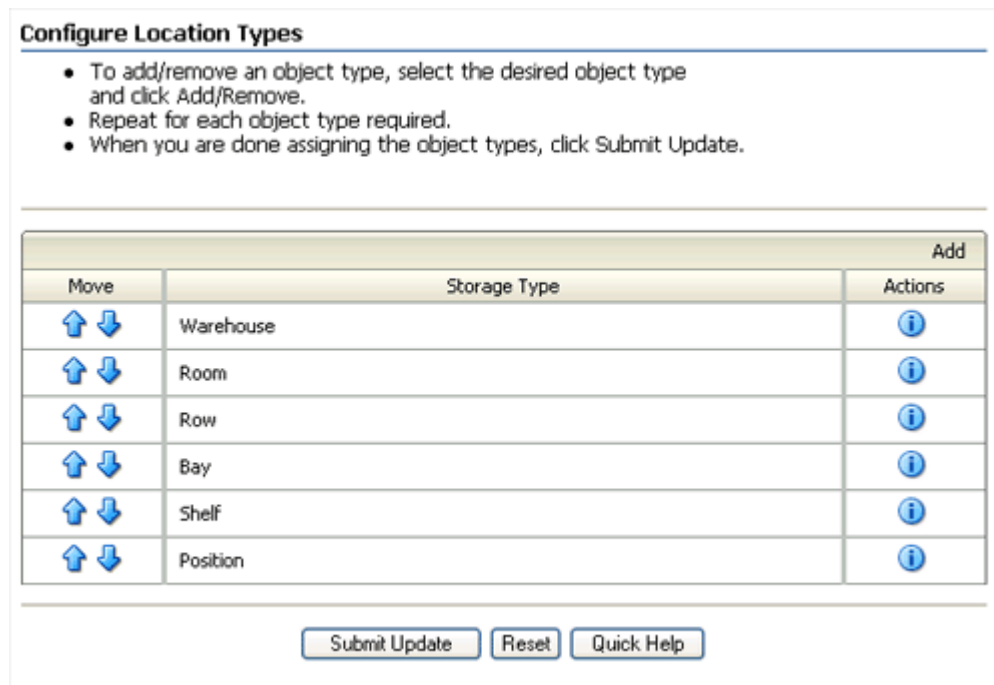
Use the Configure Location Types page to add, edit, delete, or reorder location types. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Physical Administration**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Location Types**.

Figure 5-15 Location Types configuration page



Page Features

The table below describes the various features of the Configure Location Types page.

Feature	Description
Location types list	The box lists all currently defined location types in their assigned hierarchical order. The higher an item in the list, the higher it is in the storage hierarchy. A location type contains all location types below it in the list. The location type at the bottom of the list is the most specific (and smallest) storage location. This may be the only storage location that actually holds physical content. All higher-level units are then used for space management purposes.
Up arrow ()	Click this icon to move the associated item up one level in the storage hierarchy.

Feature	Description
Add button	Click this button to display the Create Location Type page (page 5-45), where you can define a new location type.
Info button	After selecting a location type in the list, click this button to display the Location Type Information page (page 5-50), where you can view or edit the properties of the location type. You can also delete the location type from this page.
Down arrow (↓)	Click this icon to move the associated item down one level in the storage hierarchy.
Submit Update button	Click this button to submit your updated location type definitions.
Quick Help button	Click this button to display context-specific help information about this page.

Create/Edit Location Type Page



Note: You must have the PCM.Admin.Manager *and* PCM.Admin.LocationTypes [rights](#) to create or edit location types. By default, this right is assigned to the predefined 'pcmadmin' role.

Create Location Type Page

Use the Create Location Type page to define a new location type that can be used in the definition of the [storage environment](#) (see chapter 6). To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Physical Administration**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Location Types**.

The [Configure Location Types Page](#) (page 5-43) is displayed.

5. Click **Add**.

Figure 5-16 Create Location Type page

Configure Location Types --> Create Location Type

Location Type ID

Location Name

Description

Tooltip

Allow storage of content (default)

Content Items Allowed

Image

Edit Location Type Page


Use the Edit Location Type page to modify the properties of an existing location type. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Physical Administration**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Location Types**.

The [Configure Location Types Page](#) (page 5-43) is displayed.

5. In the list of existing location types, select the item you want to edit, and click the info icon ()


The [Location Type Information Page](#) (page 5-50) for the selected location type is displayed.


6. In the titlebar, click **Edit**.

Page Features

The table below describes the various features of the Create Location Type and Edit Location Type pages.

Feature	Description
Location Type ID	Enter a unique identifier for the location type. This is the name that is displayed in the location type hierarchy (see page 5-43). <ul style="list-style-type: none"> ❖ Required. ❖ Maximum number of characters: 30. This field is view-only on the Edit Location Type page.
Location Name	Enter a name for the location type. <ul style="list-style-type: none"> ❖ Required. ❖ Maximum number of characters: 30.
Description	Enter a brief description for the location type (if desired). <ul style="list-style-type: none"> ❖ Optional. ❖ Maximum number of characters: 30.
Tooltip	Enter a tooltip text for the location type (if desired). This text appears if you hover the mouse cursor over the option in the location type selection list on the Create/Edit Storage Location pages (only in Netscape, Mozilla, and Firefox web browsers). <ul style="list-style-type: none"> ❖ Optional. ❖ Maximum number of characters: 30.

Feature	Description
<p>Allow storage of content (default)</p>	<p>Specifies whether the location type can hold content items by default. You can override this setting when defining storage locations in the storage space hierarchy (see chapter 6). Overriding the default setting may be useful to accommodate for abnormal storage locations, or to create a “dummy” storage location in order to maintain consistent numbering across parallel objects.</p> <p> Important: This setting applies to this specific location type level only, not to any location types lower in the storage space hierarchy. In other words, you do not need to enable this check box for a location type if its child location types will contain content. For example, in the default hierarchy, shelves have a number of positions, each of which can hold content items, but no content items can be directly assigned to the shelf level (only to the positions on a shelf). That means that the ‘Shelf’ location type does not allow storage of content, whereas the ‘Position’ location type does.</p> <p>If you select this select box, the Content Items Allowed field becomes available (see next item).</p>

Feature	Description
Content Items Allowed	<p>This field is available only if the “Allow storage of content (default)” check box is selected (see previous item). It specifies the default maximum number of content items that can be held by the location type. You can override this setting when defining storage locations in the storage space hierarchy (see chapter 6). Overriding the default setting may be useful to accommodate for abnormal storage locations.</p> <p> Important: This number applies to storage of content on this specific location type level only, not to any location types lower in the storage space hierarchy. For example, if a shelf has 10 positions, each of which can hold 2 items, then you do not need to set this field to 20 for the Shelf location type. (It should be set to 2 for the Position location type.) Physical Content Manager automatically tracks space usage based on the defined storage space hierarchy (see chapter 6).</p>
Image	<p>Select the icon image that should be used for the location type. This image is used to indicate the location type of storage locations in the Browse Storage tree in the Trays layout (see page 6-10).</p> <p>See Location Type Icons (page 5-42) for more information on the icon images used for location types.</p>
OK button (Create page only)	Click this button to create the new location type.
Submit Update button (Edit page only)	Click this button to submit the updated location type definition.

Feature	Description
Reset button	If you are creating a new location type, clicking this button resets the page to its initial default settings. If you are editing an existing location type, this returns the original location type settings before you made any modifications.
Quick Help button	Click this button to display context-specific help information about this page.

Location Type Information Page



Note: You must have the PCM.Admin.Manager *and* PCM.Admin.LocationTypes [rights](#) to view information about a location type. By default, this right is assigned to the predefined ‘pcmadmin’ role.

Use the Location Type Information page to view the properties of an existing location type. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Physical Administration**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Location Types**.

The [Configure Location Types Page](#) (page 5-43) is displayed.


5. In the list of existing location types, select the item whose properties you want to see, and click the info icon ().

Figure 5-17 Location Type Information page

The screenshot shows a dialog box titled "Configure Location Types --> Location Type Information". At the top right of the dialog are two buttons: "Edit" and "Delete". Below the title bar, the following information is displayed:

- Location Type ID: Warehouse
- Location Name: Warehouse
- Description: Warehouse
- Tooltip: Warehouse
- Allow storage of content (default): No
- Image:

At the bottom center of the dialog is an "OK" button.

This page shows the current properties of the selected location type. Only the fields that contain information are displayed. For example, if no tooltip text has been specified for the location type, this field is not shown on the page.

Titlebar

Depending on your assigned rights, there may be the following options in the titlebar in top-right corner of the page:

- ❖ **Edit**—Choose this option to [edit](#) the current location type (see page 5-53).
- ❖ **Delete**—Choose this option to [delete](#) the current location type (see page 5-53).

Creating a Location Type

Use this procedure to create a new location type that can be used in the definition of the [storage space environment](#) (see chapter 6). This is a general navigational procedure.

To view a specific example of creating a custom metadata field, see [Example: Creating a Location Type](#) (page 5-55).



Note: You must have the PCM.Admin.Manager *and* PCM.Admin.LocationTypes [rights](#) to create a location type. By default, this right is assigned to the predefined 'pcmadmin' role.

To create a location type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Physical Administration**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Location Types**.

The [Configure Location Types Page](#) (page 5-43) is displayed.

5. Click **Add**.

The [Create Location Type page](#) (page 5-45) is displayed.

6. Specify the properties of the location type, and click **OK**.

The new location type is now added to the bottom of the list on the [Configure Location Types Page](#) (page 5-43). If required, you can use the up and down arrows to move the new location type to its desired position in the location type hierarchy.

Viewing Location Type Information

Use this procedure to view information about an existing location type.



Note: You must have the `PCM.Admin.Manager` *and* `PCM.Admin.LocationTypes` [rights](#) to view information about a location type. By default, this right is assigned to the predefined ‘pcmadmin’ role.


To view information about a location type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Physical Administration**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Location Types**.

The [Configure Location Types Page](#) (page 5-43) is displayed.

5. Select the location type for which you want to see the information, and click the info icon ().

The [Location Type Information Page](#) (page 5-50) is displayed.

6. Click **OK** when you are done.

Editing a Location Type

Use this procedure to edit the properties of an existing location type.



Note: You must have the PCM.Admin.Manager *and* PCM.Admin.LocationTypes [rights](#) to edit a location type. By default, this right is assigned to the predefined 'pcmadmin' role.


To edit a location type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Physical Administration**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Location Types**.

The [Configure Location Types Page](#) (page 5-43) is displayed.

5. Select the location type that you want to edit, and click the info icon ().

The [Location Type Information Page](#) (page 5-50) is displayed.

6. From the titlebar, choose **Edit**.

The [Edit Location Type page](#) (page 5-45) is displayed.

7. Modify the properties of the location type where required, and click **Submit Update**.

The properties of the location type are updated.

Deleting a Location Type

Use this procedure to delete an existing location type.



Note: You must have the PCM.Admin.Manager *and* PCM.Admin.LocationTypes [rights](#) to delete a location type. By default, this right is assigned to the predefined 'pcmadmin' role.


To delete a location type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Physical Administration**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Location Types**.

The [Configure Location Types Page](#) (page 5-43) is displayed.

5. Select the location type that you want to delete, and click the info icon ()

The [Location Type Information Page](#) (page 5-50) is displayed.

6. From the titlebar, choose **Delete**.

The location type is deleted, and a message to that effect is displayed.

7. Click **OK** to return to the [Configure Location Types Page](#) (page 5-43).

Reordering Location Types

Use this procedure to change the hierarchical order of the defined location types.



Note: You must have the PCM.Admin.Manager *and* PCM.Admin.LocationTypes [rights](#) to reorder location types. By default, this right is assigned to the predefined ‘pcadmin’ role.



Important: Reordering location types does not affect any existing storage locations. You will need to remove the existing storage locations and rebuild the storage environment if you want it to match the reordered location types.



To reorder the existing location types, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Physical Administration**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Location Types**.

The [Configure Location Types Page](#) (page 5-43) is displayed.

5. Use the up and down arrows ( and ) to move location types to the desired level in the hierarchy.
6. Repeat this step for every location type that you want to move, until the desired storage hierarchy is achieved.
7. When you are done, click **Submit Update**.

A message is displayed saying that the location types have been configured successfully.

8. Click **OK** to return to the [Configure Location Types Page](#) (page 5-43).

Example: Creating a Location Type

This example creates a location type called “Box,” which is located at the bottom level of the storage level hierarchy (below “Position”). In other words, each position contains one or more boxes, each of which can contain a maximum of 5 physical content items.



Note: You must have the PCM.Admin.Manager *and* PCM.Admin.LocationTypes [rights](#) to perform the tasks in this example. By default, this right is assigned to the predefined ‘pcmadmin’ roles.

To create the location type in this example, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Physical Administration**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Location Types**.

The [Configure Location Types Page](#) (page 5-43) is displayed.

5. Click **Add**.

The [Create Location Type page](#) (page 5-45) is displayed.

6. In the **Location Type ID** field, type Archive.
7. In the **Name** field, type Box.
8. In the **Description** field, type a description of the location type (if desired).
9. In the **Tooltip** field, type a tooltip for the location type (if desired).
10. Make sure the **Allow storage of content (default)** check box is selected, and enter 5 in the **Content Items Allowed** field.
11. In the **Images** dropdown list, choose the *storage_box_lg.gif* icon image. This image is used to indicate the location type of storage locations in the [Browse Storage tree](#) in the Trays layout (see page 6-10).
12. Click **OK**.
A message is displayed saying that the location type has been created successfully, along with the properties of the newly created location type.
13. Click **OK**.

You return to the [Configure Location Types Page](#) (page 5-43), where the new location type “Box” is added to the bottom of the list of location types.

CONFIGURING OBJECT TYPES

This section covers the following topics:

Concepts

- ❖ [About Object Types](#) (page 5-56)
- ❖ [Predefined Object Types](#) (page 5-57)

Interface

- ❖ [Configure Object Types Page](#) (page 5-57)
- ❖ [Create/Edit Object Type Page](#) (page 5-59)
- ❖ [Object Type Information Page](#) (page 5-61)
- ❖ [Edit Object Type Relationships Page](#) (page 5-62)

Tasks

- ❖ [Creating an Object Type](#) (page 5-63)
- ❖ [Viewing Object Type Information](#) (page 5-64)
- ❖ [Editing an Object Type](#) (page 5-64)
- ❖ [Deleting an Object Type](#) (page 5-65)
- ❖ [Editing Object Type Relationships](#) (page 5-65)

About Object Types

Object types define the types of items that storage locations in the [storage hierarchy](#) can hold. The out-of-the-box Physical Content Manager application comes with a number of [predefined object types](#), but you can also [create your own](#).

When [creating a physical item](#) (see chapter 12), you specify its object type. If you select an object type that is not allowed for the assigned storage location, an error message is displayed and you cannot check in the physical item.

Object types can hold other object types. For example, the predefined Box object type can hold the following predefined object types: Folder, Optical, Micro, Document, and Tape. This enables you to control what type(s) of physical items can be created [within another physical item](#) (see page 12-22). You define the relationships between object types on the [Edit Object Type Relationships Page](#) (page 5-62).

Predefined Object Types

The out-of-the-box Physical Content Manager application comes with the following predefined object types:

- ❖ All [*i.e.*, any of the defined object types, both predefined and custom]
- ❖ Box
- ❖ Document
- ❖ Folder
- ❖ Micro
- ❖ Optical
- ❖ Tape

You can further specify what a storage location can hold using [media types](#) (see page 5-66).



Note: You do not need to specify an object type when [creating a storage location](#) (see page 6-33). The storage location can then hold any type of content. If you do select an object type, and you attempt to assign a physical item of a different object type to the storage location, an error message is displayed and you cannot check in the physical item.

Configure Object Types Page



Note: You must have the PCM.Admin.Manager [right](#) to access the Configure Object Types pages. By default, this right is assigned to the predefined 'pcmadmin' role.

Use the Configure Object Type pages to manage your defined object types. To access this page, complete the following steps:

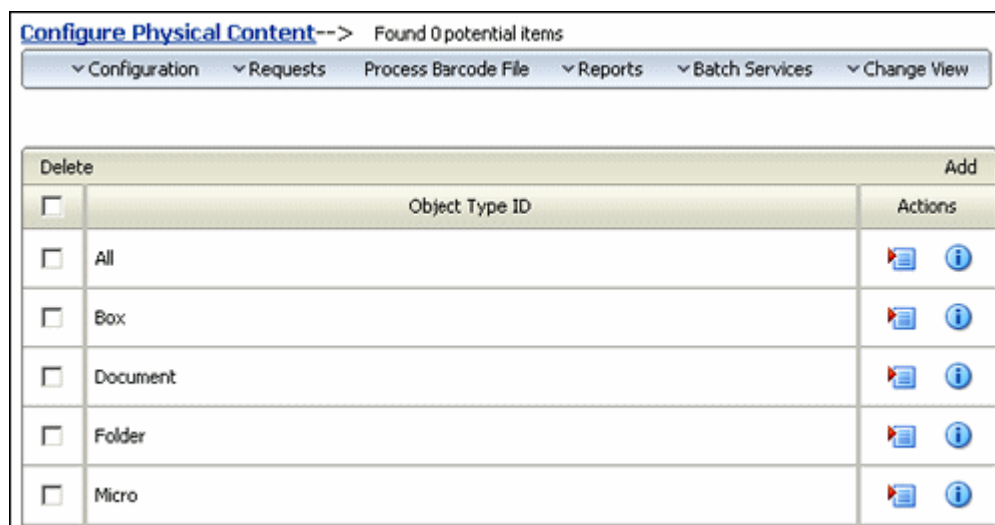
1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.

3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Object Types**.

Figure 5-18 Configure Physical Content Manager Object Type page



Page Features

The table below describes the features of the object type section of the Configure Physical Content Manager Object Type and Media Type pages.

Feature	Description
Object Types list	The dropdown menu lists all currently defined object types. It includes the predefined object types as well as any custom object types.
Add button	Click this button to display the Create Object Type page (page 5-59), where you can define a new object type.
Info button	After selecting an object type in the dropdown list, click this button to display the Object Type Information page (page 5-61), where you can view or edit the properties of the object type. You can also delete the object type from this page.

Create/Edit Object Type Page



Note: You must have the PCM.Admin.Manager [right](#) to create or edit object types. By default, this right is assigned to the predefined ‘pcmadmin’ role.

Create Object Type Page

Use the Create Object Type page to define a new object type. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Object Types**.

The [Configure Object Types Page](#) (page 5-57) page is displayed.

5. Click **Add**.

Figure 5-19 Create Object Type page

Create Object Type

Object Type ID

Object Type Name

Edit Object Type Page


Use the Edit Object Type page to modify the properties of an existing location type. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Object Types**.

The [Configure Object Types Page](#) (page 5-57) page is displayed.

5. In the list of existing object types, select the item you want to edit, and click **Edit Object Type** in the action icon menu ().

Page Features

The table below describes the various features of the Create Object Type and Edit Object Type pages.

Feature	Description
Object Type ID	Enter a unique identifier for the object type. ❖ Required. ❖ Maximum number of characters: 30. This field is view-only on the Edit Object Type page.
Object Type Name	Enter a name for the object type. This is the name that is displayed in the object type dropdown list on the Create Physical Item page (see page 12-3). ❖ Required. ❖ Maximum number of characters: 30.
OK button (Create page only)	Click this button to create the new object type.
Submit Update button (Edit page only)	Click this button to submit the updated object type definition.
Reset button	If you are creating a new object type, clicking this button resets the page to its initial default settings. If you are editing an existing object type, this returns the original object type settings before you made any modifications.
Quick Help button	Click this button to display context-specific help information about this page.

Object Type Information Page



Note: You must have the PCM.Admin.Manager [right](#) to view information about an object type. By default, this right is assigned to the predefined ‘pcmadmin’ role.

Use the Object Type Information page to view the properties of an existing object type. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Object Types**.

The [Configure Object Types Page](#) (page 5-57) page is displayed.


5. In the list of existing object types, select the object type for which you want to see the information, and click the info icon ().

Figure 5-20 Object Type Information page



This page shows the ID and name of the selected object type. In addition, it lists the object types that can be contained within the current object type. You can modify this on the [Edit Object Type Relationships Page](#) (page 5-62).

Menu Bar

Depending on your assigned rights, there may be a menu bar at the top of the page. This menu offers the following options:

- ❖ **Edit**—Choose this option to [edit](#) the current object type (see page 5-64).
- ❖ **Delete**—Choose this option to [delete](#) the current object type (see page 5-65).

Edit Object Type Relationships Page



Note: You must have the PCM.Admin.Manager [right](#) to edit relationships between object types. By default, this right is assigned to the predefined ‘pcmadmin’ role.


Use the Edit Object Type Relationships page to edit the relationships between the current object type and other object types (i.e., define what object types can be contained within the current object type). To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Object Types**.

The [Configure Object Types Page](#) (page 5-57) page is displayed.

5. In the list of existing object types, select the item for which you want to edit the object type relationships, and click **Edit Object Type Relationships** in the action icon menu ().

Page Features

The table below describes the various features of the Edit Object Type Relationships page.

Feature	Description
Assigned Object Types list	This box lists all object types that can currently be contained within the current object type. This allows you to control what type(s) of physical items can be created within another physical item (see page 12-22).
Unassigned Object Types list	This box lists all object types that can currently not be contained in the current object type.
Add button	Click this button to move an object type from the Unassigned Object Types box to the Assigned object Types box (and make it available for the current object type).

Feature	Description
Remove button	Click this button to move an object type from the Assigned Object Types box to the Unassigned object Types box (and no longer make it available for the current object type).
Submit Update button	Click this button to submit the updated relationships for the current object type.
Quick Help button	Click this button to display context-specific help information about this page.

Creating an Object Type

Use this procedure to create a new object type.



Note: You must have the PCM.Admin.Manager [right](#) to create an object type. By default, this right is assigned to the predefined 'pcmadmin' role.

To create an object type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Object Types**.

The [Configure Object Types Page](#) (page 5-57) page is displayed.

5. Click **Add** in the Object Types area.

The [Create Object Type page](#) (page 5-59) is displayed.

6. Specify the properties of the object type, and click **Create**.

A page is displays confirming that the object type was created successfully.

7. Click **OK**.

The new object type is now added to the list of object types on the [Configure Object Types Page](#) (page 5-57), and it can be selected on the [Create/Edit Physical Item Page](#) (page 12-3).

Viewing Object Type Information

Use this procedure to view information about an existing object type.



Note: You must have the PCM.Admin.Manager [right](#) to view information about an object type. By default, this right is assigned to the predefined 'pcadmin' role.


To view information about an object type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Object Types**.

The [Configure Object Types Page](#) (page 5-57) page is displayed.

5. In the list of existing object types, select the object type for which you want to see the information, and click the info icon ()
6. When you are done, click **OK** to return to the [Configure Object Types Page](#) (page 5-57).

Editing an Object Type

Use this procedure to edit the properties of an existing object type.



Note: You must have the PCM.Admin.Manager [right](#) to edit an object type. By default, this right is assigned to the predefined 'pcadmin' role.


To edit an object type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Object Types**.

The [Configure Object Types Page](#) (page 5-57) page is displayed.

5. In the list of existing object types, select the object type for which you want to see the information, and click the info icon ()

6. From the titlebar menu, choose **Edit**.
The [Edit Object Type page](#) (page 5-59) is displayed.
7. Modify the properties of the object type where required, and click **Submit Update**.
The properties of the object type are updated.


Deleting an Object Type

Use this procedure to delete an existing object type.



Note: You must have the PCM.Admin.Manager [right](#) to delete an object type. By default, this right is assigned to the predefined 'pcmadmin' role.

To delete an object type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Open the **External Content** tray or top menu.
4. Click **Configure Physical Content**.
The [Configure Physical Content Management page](#) is displayed (see page 5-2).
5. Choose **Configure—Object Types**.
The [Configure Object Types Page](#) (page 5-57) page is displayed.
6. In the list of existing object types, select the object type for which you want to see the information, and click the info icon (.
7. From the titlebar menu, choose **Delete**.
The object type is deleted, and a message to that effect is displayed.
8. Click **OK** to return to the [Configure Object Types Page](#) (page 5-57).

Editing Object Type Relationships

Use this procedure to edit the relationship between an object type and the other defined object types (i.e., define what object types can be contained within the current object type).



Note: You must have the PCM.Admin.Manager [right](#) to edit object type relationships. By default, this right is assigned to the predefined 'pcmadmin' role.


To edit object type relationships, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Open the **External Content** tray or top menu.
4. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

5. Choose **Configure—Object Types**.

The [Configure Object Types Page](#) (page 5-57) page is displayed.

6. In the list of existing object types, select the item for which you want to edit the object type relationships, and click **Edit Object Type Relationships** in the action icon menu ().

The [Edit Object Type Relationships Page](#) (page 5-62) displayed.

7. Make sure that the Assigned Object Types box contains all object types that can be contained within the current object type. If not, select the appropriate item in the Unassigned Object Types box and click **Add** to move it to the Assigned Object Types box.
8. Click **Submit Update** when you are done.

The object type relationships are updated, and the [Object Type Information Page](#) (page 5-61) is displayed again with updated values for the **Object Type Hold** field.

CONFIGURING MEDIA TYPES

This section covers the following topics:

Concepts

- ❖ [About Media Types](#) (page 5-67)
- ❖ [Predefined Media Types](#) (page 5-67)

Interface

- ❖ [Configure Media Types Page](#) (page 5-68)
- ❖ [Create/Edit Media Type Page](#) (page 5-70)

- ❖ [Media Type Information Page](#) (page 5-72)

Tasks

- ❖ [Creating a Media Type](#) (page 5-73)
- ❖ [Viewing Media Type Information](#) (page 5-74)
- ❖ [Editing a Media Type](#) (page 5-74)
- ❖ [Deleting a Media Type](#) (page 5-75)

About Media Types

Media types are an extension to [object types](#) (see page 5-56), and provide a further specification about the type of content that can be contained in a storage location in the [storage hierarchy](#).

When [creating a physical item](#) (see chapter 12), you specify its media type. The available media types depend on the selected [object type](#) for the physical item. If you select a media type that is not allowed for the assigned storage location, an error message is displayed and you cannot check in the physical item.

Predefined Media Types

The out-of-the-box Physical Content Manager application comes with the following predefined media types:

Predefined Media Types	For This Object Type
Box	Box
Mixed Fax Paper Photo	Document
Folder	Folder
Mixed Microfiche Microfilm	Micro

Predefined Media Types	For This Object Type
Mixed CD Disc DVD	Optical
Mixed Audio Data Visual	Tape
Mixed Audio Box CD Data Disc Dvd Fax Folder Microfiche Microfilm Paper Photo Visual	All

Configure Media Types Page



Note: You must have the PCM.Admin.Manager [right](#) to access the Configure Physical Content Manager Components page. By default, this right is assigned to the predefined 'pcmadmin' role.

Use the Configure Physical Content Manager Components page to manage your defined media types. The bottom section is related to media types. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.

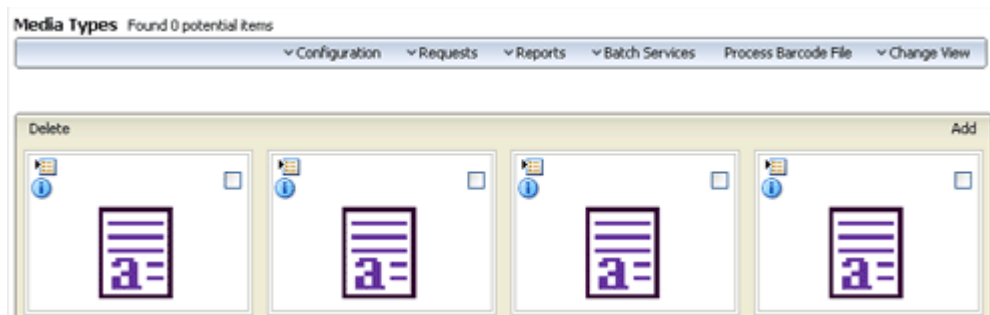
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Media Types**.

The [Configuring Media Types](#) (page 5-66) page is displayed.

Figure 5-21 Configure Media Types (thumbnail view)



Page Features

The table below describes the features of the media type section of the Configure Physical Content Manager Components page.

Feature	Description
Media Types list	The dropdown menu lists all currently defined media types. It includes the predefined media types as well as any custom media types.
Add button	Click this button to display the Create Media Type page (page 5-70), where you can define a new media type.
Info button	After selecting a media type in the dropdown list, click this button to display the Media Type Information page (page 5-72), where you can view or edit the properties of the media type. You can also delete the media type from this page.

Create/Edit Media Type Page



Note: You must have the PCM.Admin.Manager [right](#) to create or edit media types. By default, this right is assigned to the predefined ‘pcmadmin’ role.

Create Media Type Page

Use the Create Media Type page to define a new media type. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Media Types**.

The [Configuring Media Types](#) (page 5-66) page is displayed.

5. Click **Add** in the Media Types area.

Figure 5-22 Create Media Type page

Create Media Type

Media Type ID

Media Type Name

* Object Type

Edit Media Type Page


Use the Edit Media Type page to modify the properties of an existing media type. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Media Types**.

The [Configuring Media Types](#) (page 5-66) page is displayed.

5. In the list of existing media types, select the media type for which you want to see the information, and click the info icon ().

The [Media Type Information Page](#) (page 5-72) is displayed.

6. In the titlebar menu, click **Edit**.

Page Features

The table below describes the various features of the Create Media Type and Edit Media Type pages.

Feature	Description
Media Type ID	Enter a unique identifier for the media type. <ul style="list-style-type: none"> ❖ Required. ❖ Maximum number of characters: 30. This field is view-only on the Edit Media Type page.
Media Type Name	Enter a name for the media type. This is the name that is displayed in the media type dropdown list on the Create Physical Item page (see page 12-3). <ul style="list-style-type: none"> ❖ Required. ❖ Maximum number of characters: 30.
Object Type	Select the object type that the media type will be associated with. This means that the media type will be available only if the object type is selected for the physical item. You can associate only one object type with the media type.
OK button (Create page only)	Click this button to create the new media type.
Submit Update button (Edit page only)	Click this button to submit the updated media type definition.

Feature	Description
Reset button	If you are creating a new media type, clicking this button resets the page to its initial default settings. If you are editing an existing media type, this returns the original media type settings before you made any modifications.
Quick Help button	Click this button to display context-specific help information about this page.

Media Type Information Page



Note: You must have the PCM.Admin.Manager [right](#) to view information about a media type. By default, this right is assigned to the predefined ‘pcmadmin’ role.


Use the Media Type Information page to view the properties of an existing media type. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

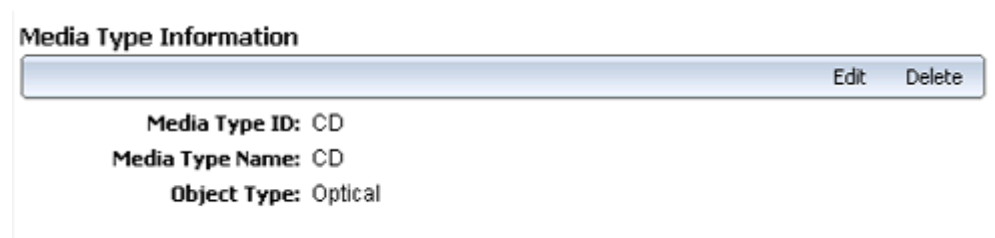
4. Choose **Configure—Media Types**.

The [Configuring Media Types](#) (page 5-66) page is displayed.

5. In the list of existing media types, select the media type for which you want to see the information, and click the info icon (.

The [Media Type Information Page](#) (page 5-72) is displayed.

Figure 5-23 Media Type Information page



This page shows the ID and name of the selected media type. In addition, it lists the object type that is associated with the current media type. You can modify this on the [Edit Media Type page](#) (page 5-70).

Menu Bar

Depending on your assigned rights, there may be the following options in the titlebar in top-right corner of the page:

- ❖ **Edit**—Choose this option to edit the current media type (see page 5-74).
- ❖ **Delete**—Choose this option to delete the current media type (see page 5-75).

Creating a Media Type

Use this procedure to create a new media type.



Note: You must have the PCM.Admin.Manager [right](#) to create a media type. By default, this right is assigned to the predefined 'pcmadmin' role.

To create a media type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Media Types**.

The [Configuring Media Types](#) (page 5-66) page is displayed.

5. Click **Add** in the Media Types area.

The [Create Media Type page](#) (page 5-70) is displayed.

6. Specify the properties of the media type, and click **Create**.

A page is displayed confirming that the media type was created successfully.

7. Click **OK**.

The new media type is now added to the list of media types on the [Configure Media Types Page](#) (page 5-68), and it can be selected on the [Create/Edit Physical Item Page](#) (page 12-3).

Viewing Media Type Information

Use this procedure to view information about an existing media type.



Note: You must have the PCM.Admin.Manager [right](#) to view information about a media type. By default, this right is assigned to the predefined 'pcadmin' role.


To view information about a media type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Media Types**.

The [Configuring Media Types](#) (page 5-66) page is displayed.

5. In the list of existing media types, select the media type for which you want to see the information, and click the info icon (.

The [Media Type Information Page](#) (page 5-72) is displayed.

6. When you are done, click **OK** to return to the [Configure Media Types Page](#) (page 5-68).

Editing a Media Type

Use this procedure to edit the properties of an existing media type.



Note: You must have the PCM.Admin.Manager [right](#) to edit a media type. By default, this right is assigned to the predefined 'pcadmin' role.


To edit a media type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Media Types**.

The [Configuring Media Types](#) (page 5-66) page is displayed.

5. In the list of existing media types, select the media type for which you want to see the information, and click the info icon ().

The [Media Type Information Page](#) (page 5-72) is displayed.

6. From the titlebar menu, choose **Edit**.

The [Edit Media Type page](#) (page 5-70) is displayed.

7. Modify the properties of the media type where required, and click **Submit Update**.

The properties of the media type are updated.

Deleting a Media Type

Use this procedure to delete an existing media type.



Note: You must have the PCM.Admin.Manager [right](#) to delete a media type. By default, this right is assigned to the predefined 'pcmadmin' role.


To delete a media type, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Media Types**.

The [Configuring Media Types](#) (page 5-66) page is displayed.

5. In the list of existing media types, select the media type for which you want to see the information, and click the info icon ().

The [Media Type Information Page](#) (page 5-72) is displayed.

6. From the titlebar menu, choose **Delete**.

The media type is deleted, and a message to that effect is displayed.

7. Click **OK** to return to the [Configure Object Types Page](#) (page 5-57).

CONFIGURING DEFAULT RESERVATION METADATA VALUES

This section covers the following topics:

Concepts

- ❖ [About Reservation Metadata Values](#) (page 5-76)

Interface

- ❖ [Default Metadata for Checked-in Reservation Entries Page](#) (page 5-76)

Tasks

- ❖ [Setting Default Metadata Values for Reservation Items](#) (page 5-78)

About Reservation Metadata Values

If a user [submits a reservation request](#) for one or more items (see page 10-33), a new content item is checked into the content server (in the Reservation security group). This content item automatically enters the Reservation Process workflow, and the system administrator receives a workflow review notification about the request. After reviewing the reservation request, the system administrator can further process the reservation request in accordance with the applicable procedures within the organization.

You can [set the default metadata values](#) for the reservation items that are checked into the content server (see below).

Default Metadata for Checked-in Reservation Entries Page

Use the Default Metadata for Checked-in Reservation Entries page to set the default metadata values for reservation items that are checked into the content server. See [Reservation Workflow](#) (page 10-5) for further details.



Note: You must have the PCM.Admin.Manager [right](#) to access the Default Metadata for Checked-in Reservation Entries page. By default, this right is assigned to the predefined 'pcmadmin' role.

To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Reservation Default Metadata**.

Figure 5-24 Default Metadata for Checked-in Reservation Entries page

Default Metadata for Checked-in Reservation Entries

* Content ID: res

* Type: REQUEST - PCM Request

* Title: Reservation

* Author: sysadmin sysadmin

* Security Group: Reservation

* Revision: 1

Comments: [Text Area]

wwwEmailId: [Text Field]

Profile Trigger: [Text Field] [Dropdown]

* Category or Folders: [Browse...]

* Release Date: 2/26/07 4:01 PM

Expiration Date: [Text Field] [Calendar Icon]

[Submit Update] [Reset] [Quick Help]

You can set the default metadata values for reservation items that are checked into the content server and enter the [reservation workflow](#) (see page 10-5). Please note the following:

- ❖ The default content ID is “res.” This is a prefix that is added to the reservation ID to create the full content ID of a reservation item (for example, “res1430068”). You cannot modify this setting.
- ❖ The default content type is “REQUEST - PCM Request.”

- ❖ The default title is “Reservation.” This is a prefix that is added to the [reservation request name](#) to create the full title of a reservation item (for example, “Reservation My Request”).
- ❖ The default security group is “Reservation.”



Important: You may change the content type and security group, but if you do, you need to modify your reservation process and workflow to match the new settings.

Setting Default Metadata Values for Reservation Items

Use this procedure to set the default metadata values for reservation items that are checked into the content server.



Note: You must have the PCM.Admin.Manager [right](#) to set the default metadata for reservations. By default, this right is assigned to the predefined ‘pcmadmin’ role.

To set the default reservation metadata values, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Reservation Default Metadata**.

The [Default Metadata for Checked-in Reservation Entries Page](#) (page 5-76) page is displayed.

5. Set the metadata values as desired, and click **Submit Update**.

CONFIGURING CUSTOM METADATA FIELDS

This section covers the following topics:

Concepts

- ❖ [About Custom Metadata Fields](#) (page 5-79)

Interface

- ❖ [Custom Metadata Page](#) (page 5-80)
- ❖ [Create Metadata Field Page](#) (page 5-80)

Tasks

- ❖ [Creating a Custom Metadata Field](#) (page 5-85)
- ❖ [Editing a Custom Metadata Field](#) (page 5-85)
- ❖ [Deleting a Custom Metadata Field](#) (page 5-86)

Examples

- ❖ [Example: Creating a Custom Metadata Field](#) (page 5-87)

About Custom Metadata Fields

If your organization has unique needs for metadata fields for physical content, then you can easily customize the physical content management environment to include these fields.

The new custom fields are displayed at the bottom of the Create Physical Item page (including the edit and information pages for these physical items), as well the search pages for physical items. The order in which the custom metadata fields appear depends upon the order you indicate in the custom metadata fields box. You can easily arrange the fields via the up and down arrows next to the custom metadata box.



Note: You must have the PCM.Admin.Manager [right](#) to work with custom metadata fields for physical content. By default, this right is assigned to the predefined ‘pcmadmin’ role.

Custom Metadata Page



Note: You must have the PCM.Admin.Manager [right](#) to work with custom metadata fields for physical content. By default, this right is assigned to the predefined ‘pcmadmin’ role.

Use the Custom Metadata for Physical Content Manager page to create, edit, or delete custom metadata fields for physical content items. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Custom Metadata**.

Figure 5-25 Custom Metadata for Physical Content Manager page

Name	Caption	Type	Order	Is Required	Is Enabled	Is Searchable	Actions
>FirstEntryDate	Date First Stored	Date		FALSE	TRUE	TRUE	
>MidStore	Additional Storage Date	Date		FALSE	TRUE	TRUE	

This page lists all defined custom metadata fields. The options on this page enable you to add new fields, delete existing fields, and view the properties of existing fields.

Create Metadata Field Page



Note: You must have the PCM.Admin.Manager [right](#) to create custom metadata fields. By default, this right is assigned to the predefined ‘pcmadmin’ role.

Use the Create Metadata Field page to create a new custom metadata field for physical content, or edit the properties of an existing field. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.

3. Click **Configure Physical Content**.
The [Configure Physical Content Management page](#) is displayed (see page 5-2).
4. Choose **Configure—Custom Metadata**.
The [Custom Metadata Page](#) (page 5-80) page is displayed.
5. Click **Add** to create a new metadata field, or select an existing metadata field in the list and click **Edit** to modify it.

Figure 5-26 Create Metadata Field page (for new field)

Create field for 'Physical'
Define a field for the current metadata set.

* Name

* Caption

* Type

Order

Default Value

Is Required

Is Enabled

Is Searchable

Option List

Option List Type

Page Features

The table below describes the various features of the Create Metadata Field page.

Feature	Description
Name	<p>Enter a unique name for the custom metadata field for physical content. This name represents the field name in the database.</p> <ul style="list-style-type: none"> ❖ Required. ❖ Maximum number of characters: 30. ❖ You cannot use any of the following characters in the metadata field name: spaces, tabs, line feeds, carriage returns, semi-colon (;), caret (^), question mark (?), colon (:), at-sign (@), ampersand (&), plus sign (+), double-quote ("), hash sign (#), less-than sign (<), asterisk (*), tilde (~), pipe symbol (), and dash (-). If you use any of these characters, an error message is displayed when you click Submit Update, and not field is created. ❖ You cannot use any of the following reserved words as the metadata field name: int, integer, Integer, string, String, long, Long, boolean, Boolean, float, Float, double, and Double. If you use any of these characters, an error message is displayed.
Caption	<p>Enter a caption for the custom metadata field. The caption is the field label that is displayed in the user interface (if the field is enabled).</p> <ul style="list-style-type: none"> ❖ Required. ❖ Maximum number of characters: 30.

Feature	Description
Type	<p>Select the data type for the custom metadata field for physical content. The following data types are supported:</p> <ul style="list-style-type: none"> ❖ Text—Text field of 30 characters. ❖ Long Text—Text field of 100 characters. ❖ Integer—An integer value ranging from -2^{31} to 2^{31} (-2 billion to +2 billion). By definition, an integer is a natural number, so decimal values and commas are not permitted. ❖ Memo—Text field of 1,000 characters. ❖ Date—A date field according to the date format specified in your system settings, such as <i>dd/mm/yyyy</i> or <i>dd/mm/yy</i> for the English-US locale. Selecting this type automatically puts the calendar icon next to the date field.
Default Value	<p>Enter a default value for an options list or a field of type Text or Long Text.</p> <ul style="list-style-type: none"> ❖ Optional. ❖ Maximum number of characters: 30.
Is Required	<p>Specify whether the custom metadata field is required or optional. The available options are:</p> <ul style="list-style-type: none"> ❖ No—The field is optional. Users do not need to provide a value for the field. ❖ Yes—The field is required. Users must provide a value for the field. If they do not, an error message is displayed.
Is Enabled	<p>Specify whether the field is enabled (displayed) in the user interface. The available options are:</p> <ul style="list-style-type: none"> ❖ No—The field is not enabled for end-user interaction. ❖ Yes (default)—The field is displayed in the user interface and users can interact with the field.

Feature	Description
Is Searchable	<p>Specify whether the field is indexed in the database and therefore searchable by end-users. The available options are:</p> <ul style="list-style-type: none"> ❖ No—The field cannot be searched by users and is not displayed on any search pages. ❖ Yes (default)—The field can be searched by users and is displayed on search pages.
Option List	<p>Specify whether there is an options list for the custom metadata field. The available options are:</p> <ul style="list-style-type: none"> ❖ No—There is no options list for the field; the user must enter the text manually or in some other manner, such as selecting a date from a calendar popup. ❖ Yes—The field has a corresponding options list from which users can select a value. Populate the options via the Option List Entries field.
Option List Type	<p>Select the type of the option list:</p> <ul style="list-style-type: none"> ❖ Select List Validated ❖ Select List Not Validated ❖ Edit And Select List ❖ Multiselect List ❖ Edit And Multiselect List <p>See the Content Server administrator documentation for more information about these option list types.</p>
Save button	Click this button to create a new custom metadata field.
Reset button	If you are creating a new custom metadata field, clicking this button resets the page to its initial default settings. If you are editing an existing metadata field, this returns the original metadata field settings before you made any modifications.
Quick Help button	Click this button to display context-specific help information about this page.

Creating a Custom Metadata Field

Use this procedure to create a new custom metadata field for physical content. This is a general navigational procedure. To view a specific example of creating a custom metadata field, see [Example: Creating a Custom Metadata Field](#) (page 5-87).



Note: You must have the PCM.Admin.Manager [right](#) to create a custom metadata field for physical content. By default, this right is assigned to the predefined 'pcmadmin' role.

To create a custom metadata field for physical content, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Custom Metadata**.

The [Custom Metadata Page](#) (page 5-80) page is displayed.

5. Click **Add**.

The [Create Metadata Field Page](#) (page 5-80) is displayed.

6. Specify the properties of the custom metadata fields, and click **OK**.

The new field is now included in the custom metadata fields box on the [Custom Metadata for Physical Content Manager page](#) (see page 5-80) and, depending on its settings, may also be displayed at the bottom of the Create Physical Item and Search Physical Items pages.

Editing a Custom Metadata Field

Use this procedure to edit the properties of an existing custom metadata field for physical content.



Note: You must have the PCM.Admin.Manager [right](#) to edit a custom metadata field. By default, this right is assigned to the predefined 'pcmadmin' role.

To edit a custom metadata field for physical content, complete the following steps:


1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.

3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Custom Metadata**.

The [Custom Metadata Page](#) (page 5-80) page is displayed.

5. In the list of existing custom metadata fields, select the field you want to edit, and click **Update Field** in the action icon menu ().

The Update Field for 'Physical' is displayed.

6. Modify the properties of the custom metadata fields where required, and click **Save**.

The properties of the custom metadata field are updated.

Deleting a Custom Metadata Field

Use this procedure to delete a custom metadata field for physical content.



Note: You must have the PCM.Admin.Manager [right](#) to delete a custom metadata field. By default, this right is assigned to the predefined 'pcmadmin' role.


To delete a custom metadata field for physical content, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Custom Metadata**.

The [Custom Metadata Page](#) (page 5-80) page is displayed.

5. In the list of existing custom metadata fields, select the field you want to delete, and click **Delete Field** in the action icon menu ().



Caution: Make sure that you select the right custom metadata field to be deleted as the selected field is deleted without any warning!



Tech Tip: If you want to delete *all* defined custom metadata fields for physical content, you can also click the Reset button on the [Custom Metadata Page](#) (page 5-80). Use this option with care as all fields are removed immediately without any further prompts. Also, this action cannot be undone

Example: Creating a Custom Metadata Field

This example creates a custom metadata field that is an optional text box in which you enter the name of the archive supervisor.



Note: You must have the PCM.Admin.Manager [right](#) to perform the tasks in this example. By default, this right is assigned to the predefined ‘pcmadmin’ role.

To create the custom metadata field, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Custom Metadata**.

The [Custom Metadata Page](#) (page 5-80) page is displayed.



5. Click **Create Field**.

The [Create Metadata Field Page](#) (page 5-80) is displayed.

6. Complete the metadata fields as follows:
 - a. In the **Name** box, type Archive_Supervisor.
 - b. In the **Caption** box, type Archive Supervisor.
 - c. In the **Type** list, select **Text**.
 - d. Leave the **Order** field empty.
 - e. Leave the **Default Value** empty.
 - f. In the **Is Required** list, do not mark the checkbox.
 - g. In the **Is Enabled** list, mark the checkbox.
 - h. In the **Is Searchable** list, mark the checkbox.
 - i. Leave the **Option List Type** blank.

7. Click **Save**.

The [Custom Metadata Page](#) (page 5-80) is displayed, with the newly defined field added to the list.

8. If you want, you can use the up and down arrows ( and ) to modify the display order of the defined fields.
9. When you are done, click **Submit Update**.

The [Custom Metadata Page](#) (page 5-80) is refreshed, with the new field and/or field order activated. The new field is now included at the bottom of the Create Physical Item and Search Physical Items pages.

Figure 5-27 Archive Supervisor field at the bottom of the Create Physical Item page

The screenshot shows a form with three input fields and three buttons. The first field is labeled 'Archive Supervisor' and is empty. The second field is labeled 'Date First Stored' and contains the value '0000', with a calendar icon to its right. The third field is labeled 'Additional Storage Date' and is empty, also with a calendar icon to its right. Below the fields are three buttons: 'Create', 'Reset', and 'Quick Help'.

CREATING DISPOSITION RULES FOR PHYSICAL CONTENT

Like records, physical items can be assigned retention schedules, which define their life cycle. When creating a physical item, either as a [record](#) or [non-record content](#), you can assign a retention schedule to it. This links the physical item to a set of retention and disposition rules, which specify how long an item should be stored and when and how it should be disposed of.

The same retention schedules and disposition rules may be used for physical items as for electronic records, but you may also define disposition rules specifically for physical items.



Note: For more information about setting up retention schedules and disposition rules for physical item, refer to the *Records Manager System Setup Guide*.

SPECIFYING BARCODE VALUES FOR USERS

By default, the [barcode value for a user](#) (see page 9-3) consists of that user's login name in all upper-case letters, for example 'JSMITH' or 'MJONES'. If you do not want to use the login name of a user as the barcode value, you can use Content Server's User Admin utility to specify a different value for that user.

This is especially useful for login names that contain characters other than the basic letters (a-z, A-Z) or numbers (0-9) (for example, accented letters such as 'kmüller'). By default, the barcode values generated for such users include hexadecimal representations of the accented letters (for example, 'KMC39CLLER'). You can avoid this behavior by setting

specific barcode values for these users (for example, 'KMULLER'), which are then used rather than the (converted) user login names.

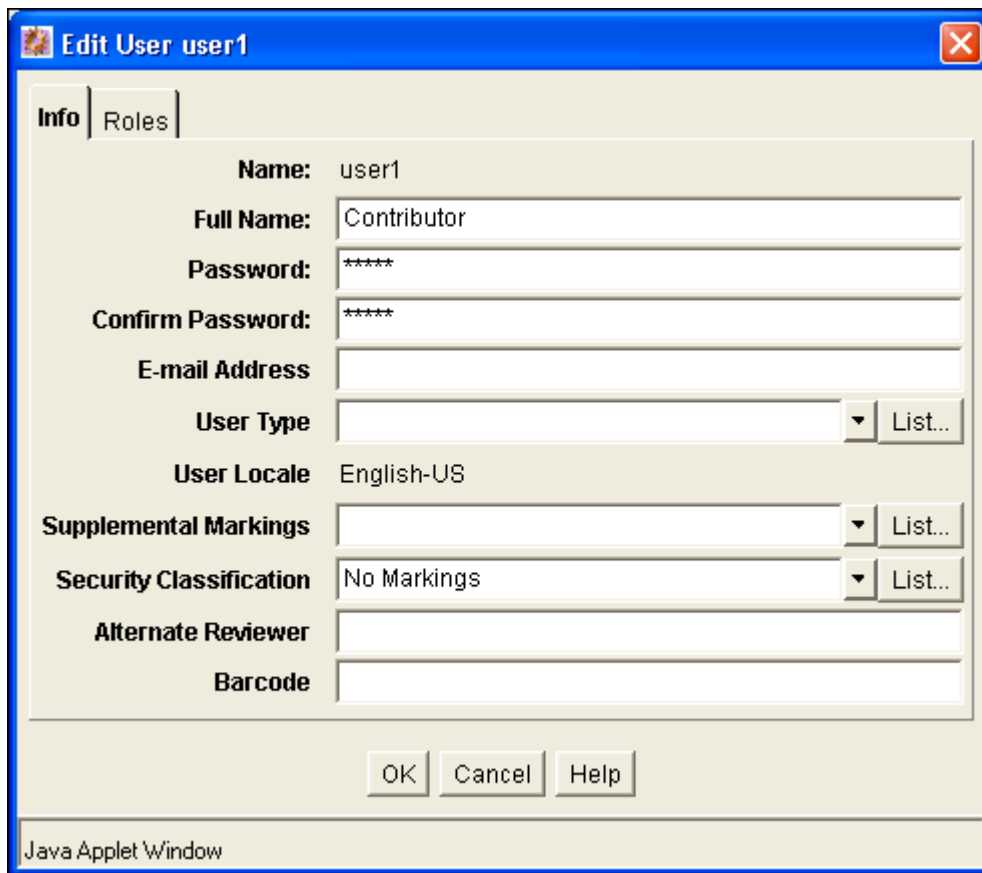


Tech Tip: You can run the “Update Users with no Barcode” [batch service](#) (see page 5-9) to automatically set the barcode values for all users that currently do not have a barcode value. This is useful for users that are already in the system before Physical Content Manager was installed. The barcode values are set in accordance with the rules above.

To manually set a specific barcode value for a user, complete the following steps:

1. Log into the content server as an administrator.
2. Choose **Administration—Admin Applets**.
3. Click the **User Admin** icon.
The User Admin utility is started.
4. On the **Users** tab, select the user whose barcode value you want to set, and click **Edit**.
The Edit User dialog is displayed.

Figure 5-28 Setting a barcode value for a user in the User Admin utility



- In the **Barcode** field, specify a unique value for the user. This value will be used in the barcode label for that user rather than the user’s login name (in all upper-case letters) as specified in the Name field.



Note: You cannot use any accented letters in the barcode value (an error message is displayed if you try). Also, any lower-case letters are automatically converted to upper case after you click **OK**.



Note: The specified value must be unique for each user in the system. An error message will be displayed if you attempt to set a value that is not unique.

- Click **OK** when you are done.
- Close the User Admin utility.

SETTING UP STORAGE SPACE

OVERVIEW

This section deals with setting up and managing a storage environment in Physical Content Manager. It covers the following topics:

Concepts

- ❖ [About Storage Space](#) (page 6-2)
- ❖ [Storage Location Properties](#) (page 6-4)
- ❖ [Storage Space Considerations](#) (page 6-9)

Interface

- ❖ [Browse Storage Tree](#) (page 6-10)
- ❖ [Exploring “\[Location\]” Pages](#) (page 6-12)
- ❖ [Create/Edit Storage Page](#) (page 6-18)
- ❖ [Create Batch Storage Import File Page](#) (page 6-24)
- ❖ [Select Storage Location Dialog](#) (page 6-29)
- ❖ [Storage Information Page](#) (page 6-30)
- ❖ [Physical Items Pages](#) (page 6-32)

Tasks

- ❖ [Creating a Storage Location](#) (page 6-33)
- ❖ [Batch Creating Storage Locations](#) (page 6-34)
- ❖ [Editing a Storage Location](#) (page 6-35)
- ❖ [Viewing Information on a Storage Location](#) (page 6-36)
- ❖ [Deleting a Storage Location](#) (page 6-37)
- ❖ [Blocking a Storage Location](#) (page 6-38)
- ❖ [Reserving a Storage Location](#) (page 6-39)
- ❖ [Viewing All Items in a Storage Location](#) (page 6-40)
- ❖ [Printing Labels for Storage Locations](#) (page 6-41)

Examples

- ❖ [Example: Creating a Single Storage Location](#) (page 6-43)
- ❖ [Example: Creating a Batch of Storage Locations](#) (page 6-44)

ABOUT STORAGE SPACE

Before you can use Physical Content Manager to keep track of the storage and retention of physical content items, you need to set up the storage space environment for your organization. This consists of defining the storage locations and their relationships. You can define [one storage location at a time](#) (see page 6-33), or you can use the [batch storage creation](#) feature to define a complete storage hierarchy by specifying a number of creation rules (see page 6-24).

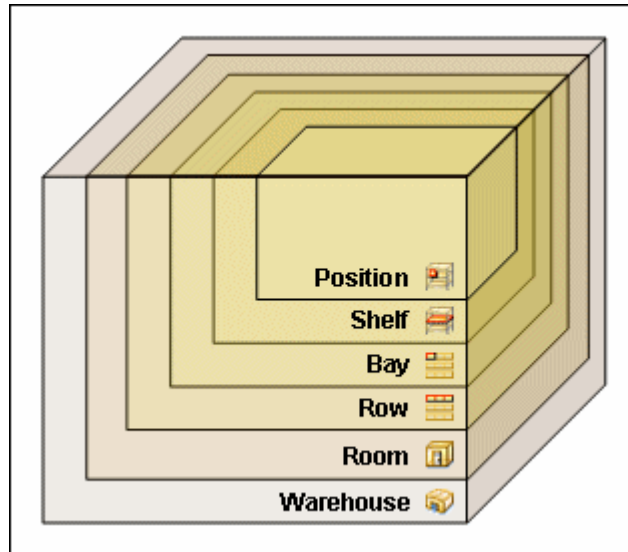
When [checking in](#) a physical item (see chapter 12), you assign that item to a storage location, so Physical Content Manager knows where it is stored and can keep track of it.

Storage Space Hierarchy

Storage space in Physical Content Manager is set up hierarchically—it describes storage locations which contain other, smaller storage locations which contain still smaller storage locations, etc., as illustrated in Figure 6-29 below. The out-of-the-box Physical Content Manager application comes with the following storage space hierarchy:

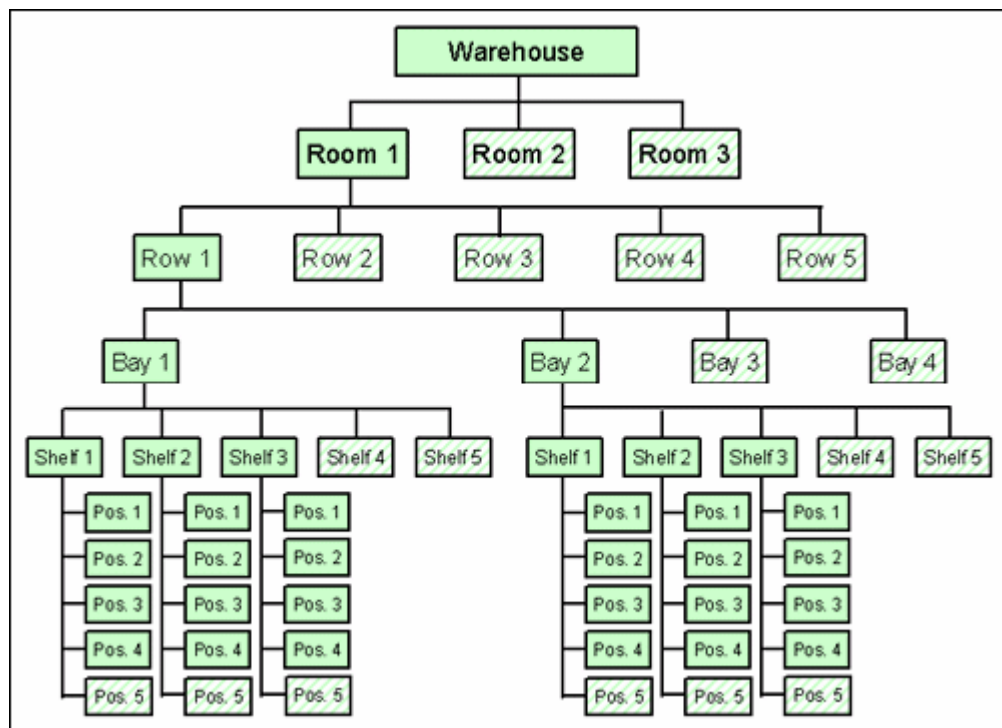
Warehouse (🏠) > Room (🏢) > Row (📊) > Bay (📊) > Shelf (📚) > Position (📚)

Figure 6-29 Default storage space hierarchy



As shown in Figure 6-29 above, a warehouse consists of one or more rooms, a room consists of one or more rows, etc. The further down in the hierarchy, the more specific (and smaller) the storage locations become.

Figure 6-1 Example storage space environment





Tech Tip: If you created a storage hierarchy on another computer, you can use the [export and import](#) features to duplicate that hierarchy on other computers (see chapter 7). This prevents you from having to re-define the storage hierarchy from scratch.

Storage Space Tracking

Physical Content Manager keeps track of the use of space in the defined storage environment, and provides information about the available space in a storage location on the [information page](#) for that location (see page 6-30). It will not allow users to store items in a location that does not have sufficient space.



Important: By default, the available storage space is recalculated once a day at midnight. This means that the displayed storage availability information may not be entirely up to date as the day progresses since it still reflects the situation from the night before. If you are an administrator with the `PCM.Admin.Manager` [right](#), you can force an immediate recalculation of all available storage space by running the “Process Storage Space Counts” [batch service](#) (see page 3-3).

STORAGE LOCATION PROPERTIES

Each storage location in the [storage space hierarchy](#) has a number of properties, including:

- ❖ [Location Type](#) (page 6-4)
- ❖ [Object Type](#) (page 6-6)
- ❖ [Media Type](#) (page 6-7)
- ❖ [Storage Status](#) (page 6-8)

Location Type

Each storage location is assigned a location type, which helps specify where it is located in the [storage space hierarchy](#). The available location types are defined on the [Configure Location Types page](#) (see page 5-43).

The out-of-the-box Physical Content Manager application comes with the following predefined location types (in hierarchical order):

- ❖ Warehouse
- ❖ Room

- ❖ Row
- ❖ Bay
- ❖ Shelf
- ❖ Position

These location types can easily be [modified](#) to suit your specific storage requirements (see page 5-40).

When defining a new storage location in the storage space environment, you select its location type from a list of defined types:

Figure 6-2 Dropdown list of defined location types

The image shows a screenshot of a web-based form for defining a storage location. The form includes several input fields: 'Storage Name', 'Description', 'Location Type', 'Location Holds', 'Maximum Items Allowed', and 'Barcode'. The 'Location Type' dropdown menu is open, displaying a list of options: Warehouse, Room, Row, Bay, Shelf, and Position. The 'Warehouse' option is currently selected and highlighted in blue.

The available location types for a storage location depend on the hierarchical storage level that the storage location is on. The table below explains what location types can be selected for each predefined storage level (in hierarchical order):

At this storage level...	You can add these location types
Top level (“Storage”)	Warehouse Room
Warehouse	Room Row Bay Shelf Position

At this storage level...	You can add these location types
Room	Row Bay Shelf Position
Row	Bay Shelf Position
Bay	Shelf Position
Shelf	Position
Position	—



Tech Tip: By default, at the highest storage level, you can only add the two highest-level location types (“Warehouse” and “Room”). If you want more location types to be available, then you must modify the following configuration variable in `[CS_Instance]/custom/PhysicalContentManager/physicalcontentmanager_environment.cfg`:

`NumberOfStorageTypeRootsToShow=x`

where *x* is the number of location type levels that you want to be available at the highest storage level. For example, if you want users to be able to add storage locations of location types Warehouse, Room, or Row, you need to change the default value from 2 (default) to 3. Please note that you need to restart the content server for the change to take effect.

Object Type

The object type of a storage location in the [storage space hierarchy](#) specifies what type of items that storage location can hold.

The out-of-the-box Physical Content Manager application comes with the following predefined object types:

- ❖ All [*i.e.*, any of the [defined object types](#), both predefined and custom]
- ❖ Box
- ❖ Document

- ❖ Folder
- ❖ Micro
- ❖ Optical
- ❖ Tape

You can also [create](#) your own object types (see page 5-63).

Media Type

The media type of a storage location in the [storage space hierarchy](#) provides a further specification of the type of items that storage location can hold.

The out-of-the-box Physical Content Manager application comes with a number of [predefined media types](#) (see page 5-67), but you can also [create](#) your own (see page 5-73).

The available media types depend on the selected [object type](#) of the current storage location. The table below explains which predefined media types can be selected for each predefined [object type](#):

This object type...	Supports these media types
Box	Box
Document	Mixed Fax Paper Photo
Folder	Folder
Micro	Mixed Microfiche Microfilm
Optical	Mixed CD Disc DVD

This object type...	Supports these media types
Tape	Mixed Audio Data Visual
All	Mixed Audio Box CD Data Disc Dvd Fax Folder Microfiche Microfilm Paper Photo Visual

Storage Status

If a storage location in the storage space can hold content items, its status determines whether content can be stored in the unit, and if not, why not. The status of a storage location is shown in the status column on the [Exploring “\[Location\]” pages](#) (see page 6-12), and can be any of the following:

❖ **Available**

Content can be stored in the storage location, and space is available. This is the default—in other words, if no status is provided, this one is assumed.

❖ **Reserved**

No content can be stored in the storage location or any of its child storage locations because it has been [reserved](#). There may be space available in the storage location, but it has been set aside for future storage of physical items. You can, for example, use this status to reserve space if you want to group batches of items and store them together as they come in to be stored. Only an administrator or the person who reserved a storage location can add items to it.

❖ **Occupied**

The storage location has reached its maximum storage capacity, and no further content can be added to it. This status is for display and information purposes only, and cannot be selected when defining or editing a storage location.



Note: If you do not select a specific storage status for a location that can hold content, the status 'Available' is assumed.



Note: If a storage location is **blocked**, its status column on the [Exploring “\[Location\]” pages](#) (see page 6-12) is empty.



Note: See also a number of important [storage space considerations](#) below.

STORAGE SPACE CONSIDERATIONS

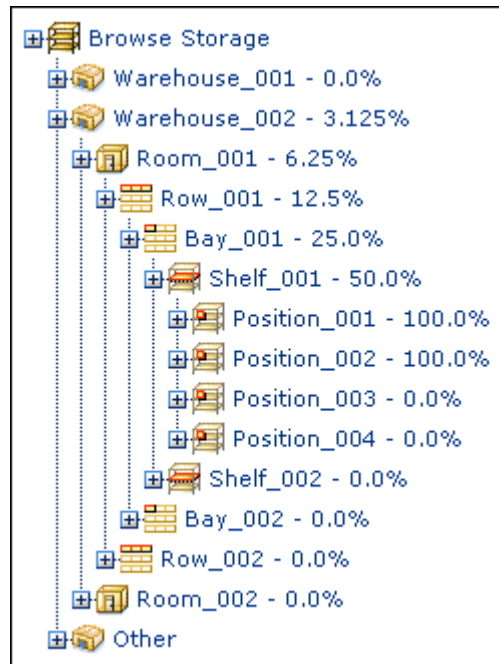
Please note the following important considerations with regard to storage space management:

- ❖ At the root (top) level of the storage space hierarchy (“Storage”), you can only add the two highest-level location types (“Warehouse” and “Room”) by default. If you want more location types to be available, then you must modify the following configuration variable in `[CS_Instance]/custom/PhysicalContentManager/physicalcontentmanager_environment.cfg`:
`NumberOfStorageTypeRootsToShow=x`
 where *x* is the number of location type levels that you want to be available at the highest storage level. For example, if you want users to be able to add storage locations of location types Warehouse, Room, or Row, you need to change the value from 2 (default) to 3. Please note that you need to restart the content server for the change to take effect.
- ❖ You can add as many top-level storage locations as you like (for example, one for each warehouse).
- ❖ At each level in the storage space hierarchy other than top level, you can only add storage locations of a lower location type level. For example, at the Row location type level, you can add storage locations of the types Bay, Shelf, and Position.
- ❖ Physical items not assigned to any other storage location are automatically assigned to the “Other” storage location, which is always the last of the top-level storage locations of the storage hierarchy.

- ❖ You can delete storage locations from the hierarchy only if no items are stored in them. You cannot delete the “Other” storage location, even if it is empty.
- ❖ All storage locations include a percentage which shows how much of the available storage space in the location (and all its children) is currently occupied. For example, 25% means that one quarter of the maximum allowed number of stored items is currently assigned to the storage location (and all its children). The percentage of a storage location is automatically updated as soon as you add or remove physical items in that storage location. However, the percentages of the parent storage location(s) are not updated automatically. This is done automatically once a day (see next note).
- ❖ By default, the available storage space for the entire hierarchy is recalculated once a day at midnight. This means that the displayed storage availability information may not be entirely up to date as the day progresses since it still reflects the situation from the night before. If you are an administrator with the PCM.Admin.Manager right, you can force a recalculation of all available storage space by running the “Process Storage Space Counts” [batch service](#) (see page 3-3).
- ❖ You can [block](#) a storage location, which prevents any content from being stored in the storage location or any of its child storage locations, even if it was marked to allow storage of content. You can only block empty storage locations. You can use this feature, for example, to create a “dummy” storage location in a situation where a bay cannot be used because there is a support pillar in front of it, but you do not want to break the matching bay numbering across multiple rows.
If a storage location is blocked, its status column on the [Exploring “\[Location\]” pages](#) (see page 6-12) is empty.

BROWSE STORAGE TREE

You can view the defined storage environment in a tree view with all defined storage locations in their hierarchical order by clicking **Browse Storage** in the **Browse Content** tray:

Figure 6-3 Browse Storage tree in Browse Content tray

Please note the following:

- ❖ The Browse Storage tree is not available in the Top Menus layout.
- ❖ The icons indicate the [location type](#) of the storage locations (see page 6-4).
- ❖ All storage locations include a percentage which shows how much of the available storage space in the location (and all its children) is currently occupied. For example, 25% means that one quarter of the maximum allowed number of stored items is currently assigned to the storage location (and all its children). The percentage of a storage location is automatically updated as soon as you add or remove physical items in that storage location. However, the percentages of the parent storage location(s) are not updated automatically. This is done automatically once a day (see next note).
- ❖ By default, the available storage space for the entire hierarchy is recalculated once a day at midnight. This means that the displayed storage availability information may not be entirely up to date as the day progresses since it still reflects the situation from the night before. If you are an administrator with the PCM.Admin.Manager right, you can force a recalculation of all available storage space by running the “Process Storage Space Counts” [batch service](#) (see page 3-3).
- ❖ If you drill down deep enough in the hierarchy, you can also see the items contained in a storage location.

- ❖ The Browse Storage tree will always include a storage location called “Other” at the bottom. This is the default storage location for any physical items that were not explicitly assigned to another storage location. This storage location cannot be deleted, even if it is empty.
- ❖ If you click on any hyperlinked item in the storage space tree, its [exploring page](#) is opened (see below).

EXPLORING “[Location]” PAGES

The Exploring “[Location]” pages show the child storage location of a defined storage location. You can also display a list of all [physical items](#) stored in it (see page 6-32). To access this page, complete the following steps:

1. Log into the content server.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.



Note: You can also access the top-level storage exploring page from the [Configure Physical Content Management page](#) (page 5-2) (Configuration—Storage).

4. The Exploring page for the top level (called “Storage”) is displayed. You can use the links on this page to drill down in the storage space hierarchy to the page whose Exploring page you want to see. In the default Trays layout, you can also navigate to a storage location in the [tree view](#) (see page 6-10) and click its hyperlink in the tree.

Figure 6-4 Exploring “[Location]” page (at top level in storage space hierarchy)

The screenshot shows the 'Exploring "Storage"' page with a search bar and navigation options. Below is a table listing storage locations:

Delete						
<input type="checkbox"/>	Storage Name	Location Type	Description	Status	Space Used	Actions
<input type="checkbox"/>	MainWare	Warehouse	Main Warehouse	Available		
<input type="checkbox"/>	Warehouse_001	Warehouse	Warehouse 1	Available	0.0%	
<input type="checkbox"/>	Other	Misc Storage	Location for unassigned items			

Figure 6-5 Exploring “[Location]” page (at bottom level in storage space hierarchy)

Exploring "Shelf_001" Found 0 potential items

Change View Create Edit Labels Storage Information

Storage --> Warehouse_001 --> Room_001 --> Bay_001 --> Shelf_001

Delete						
<input type="checkbox"/>	Storage Name	Location Type	Description	Status	Space Used	Actions
<input type="checkbox"/>	Position_001	Position	Position 1	Available	0.0%	
<input type="checkbox"/>	Position_002	Position	Position 2	Available	0.0%	
<input type="checkbox"/>	Position_003	Position	Position 3	Available	0.0%	

[List Physical Items that belong in Shelf_001](#)
[List Physical Items that are actually in Shelf_001](#)
 Include Child Storage Items

Breadcrumb Trail

At the top of the page there is a “breadcrumb trail,” which shows you where you are in the storage space hierarchy. This trail enables you to easily navigate between the levels in the hierarchy. You can click on any hyperlinked item in the trail to go to that level and show its Exploring page.

Figure 6-6 Breadcrumb trail on Exploring page

Storage --> Warehouse_001 --> Room_001 --> Bay_001 --> Shelf_001

Physical Item Links

Depending on where you are in the storage hierarchy, the exploring page may contain links to the physical items currently assigned to the location. There are two links, each of which link to [physical item pages](#) (see page 6-32):

- ❖ **List Physical Items that belong in [Storage_Location]**—If you click this link, a list is displayed of all items that have the specified storage location as their *permanent* location.
- ❖ **List Physical Items that are actually in [Storage_Location]**—If you click this link, a list is displayed of all items that have the specified storage location as their *current* location. This list does not include any items that would normally be in the storage location, but that are currently checked out.


If you want the list to include all physical items in the child locations of the current storage location, then select the **Include Child Storage Items** check box before clicking the link.


Page Features

The table below describes the various features of the Exploring “[Location]” pages.

Feature	Description
Selection check boxes	These enable you to select one or more items in the list. To select all items, select the check box in the column header.
Storage Name	This is the name of the storage location, as specified when the location was defined (see page 6-33). If you click on the link, a new Exploring page is displayed which lists the storage locations contained in the selected storage location. This enables you to move down to the lower levels of the storage space hierarchy.
Location Type	This specifies the type of the storage location. For more details about location types, refer to page 6-4. The available location types are defined on the Configure Location Types page (see page 5-43).
Description	This is the description of the storage location, as specified when the location was defined (see page 6-33).
Status	This specifies the current status of the storage location. For more details about the storage status, refer to page 6-8. A status is displayed only for storage locations that can hold content items. If a storage location cannot hold content (at that level), the status column is empty.

Feature	Description
Space Used	<p>This shows the occupancy percentage of the storage location and all its children. For example, 25% means that one quarter of the maximum allowed number of items that can be stored in the storage location (and all its children) is currently assigned to that location. This percentage is automatically updated as soon as you add or remove physical items in the storage location. However, the percentages of the parent storage locations are not updated automatically.</p> <p>If you are an administrator with the PCM.Admin.Manager right, you can force a recalculation of all available storage space by running the “Process Storage Space Counts” batch service (see page 3-3).</p>

Feature	Description
Actions menu icon ()	<p>If you click on this icon, a popup menu is displayed. The available menu options depend on the storage location in the row, and may include:</p> <ul style="list-style-type: none"> ❖ Storage Information—Choose this option to display the Storage Information page (see page 6-30). ❖ Edit > Block Storage—Choose this option to block the storage location and prevent further physical items from being assigned to the storage location (see page 6-38). In essence, the “Allow storage of content” setting for the storage location is set to “No” (see page 6-18). ❖ Edit > Reserve Storage—Choose this option to reserve the storage location for future storage of physical items (see page 6-39). ❖ Edit > Cancel Request—If the storage location is currently reserved, choose this option to cancel the reserved status of the storage location (see page 6-39). ❖ Create Storage Item—Choose this option to add a new storage location below the current storage location (see page 6-33). ❖ Delete—Choose this option to delete the selected storage location from the storage space hierarchy (see page 6-37). ❖ Create Physical Item—Choose this option to add a new physical content item to the selected storage location (see page 12-3). You can add items only to storage locations that allow content to be stored in them (for example, storage locations of type “Position”).

Feature	Description
Actions menu icon (continued)	<ul style="list-style-type: none"> ❖ Labels—Choose this option opens a submenu with the following options: <ul style="list-style-type: none"> • Print Label—Choose this option to print barcode labels for the current storage location (see page 6-41). This option is available only for storage locations that can hold items and do not have any child locations. In addition, you need to have the PCM.Admin.PrintLabel right to see this option. • Schedule Print Label—Choose this option to schedule the printing of a label. See the <i>Records Manager System Maintenance Guide</i> for more information about scheduling.
Info icon ()	If you click on this icon, the Storage Information page (see page 6-30) is displayed.

Menu Bar

There is a menu bar at the top of the page with the following options (depending on your assigned rights):

- ❖ **Storage Information**—Choose this option to display the [Storage Information Page](#) (page 6-30) for the current storage location.
- ❖ **Create Storage Item**—Choose this option to [create a new storage location](#) (see page 6-33).
- ❖ **Labels**—This opens a submenu with the following options:
 - **Print Labels for Children**—Choose this option to [print barcode labels](#) for all child locations of the current storage location (see page 6-41). This option is available only for storage locations that have child locations. In addition, you need to have the PCM.Admin.PrintLabel [right](#) to see this option.
 - **Print Label Including Children**—Choose this option to [print barcode labels](#) for the current storage location as well as all its child locations (see page 6-41). This option is available only for storage locations that can hold items and have child locations. In addition, you need to have the PCM.Admin.PrintLabel [right](#) to see this option.

- ❖ **Change View**—This opens a submenu with the following options:
 - **Thumbnail View**—Choose this option to display the page in thumbnail view.
 - **Headline View**—Choose this option to display the page in headline view.

CREATE/EDIT STORAGE PAGE

Create Storage Page



Note: You must have the PCM.Storage.Create [right](#) to access the Create Storage page. By default, this right is assigned to the predefined ‘pcmadmin’ role.

Use the Create Storage page to create a new storage location that physical items can be assigned to. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The [Exploring “\[Location\]” page](#) (see page 6-12) for the top level of the storage hierarchy is displayed.



Note: You can also access the top-level storage exploring page from the [Configure Physical Content Management page](#) (page 5-2) (Configuration—Storage).

4. Navigate to the storage space level—i.e., the [Exploring “\[Location\]” page](#) (see page 6-12)—where you want to create a new child storage location.
5. Choose **Create Storage Item** on the menu bar at the top of the page.




Note: You can also choose **Create Storage Item** from the actions icon menu () for a storage location in the list to add a new child storage location at that level.

Figure 6-7 Create Storage page

Edit Storage Page



Note: You must have the `PCM.Storage.Edit` right to access the Edit Storage page. By default, this right is assigned to the predefined 'pcmadmin' role.

Use the Edit Storage page to modify the properties of an existing storage location. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The [Exploring “\[Location\]” page](#) (see page 6-12) for the top level of the storage hierarchy is displayed.



Note: You can also access the top-level storage exploring page from the [Configure Physical Content Management page](#) (page 5-2) (Configuration—Storage).

4. Navigate to the storage location whose properties you want to edit, and click on the info icon (i). Alternatively, you can also choose **Storage Information** on the menu bar at the top of the page.



Note: You can also choose **Storage Information** from the actions icon menu (⋮) for a storage location in the list to edit that location's properties.

The [Storage Information Page](#) (page 6-30) is displayed.


5. Choose **Edit—Edit** from the menu bar.



Figure 6-8 Edit Storage page

Page Features

The table below describes the various features of the Create Storage and Edit Storage pages.

Feature	Description
Storage Name	Enter a unique name for the storage location. ❖ Required ❖ Maximum number of characters: 30.
Description	Enter a brief description for the storage location. ❖ Maximum number of characters: 30.
Location Type	Select the location type of the storage location. This field is view-only on the Edit Storage page. For more details about location types, refer to page 6-4. The available location types are defined on the Configure Location Types page (see page 5-43). The location types that can be selected depend on where you are in the storage hierarchy (see page 6-5). ❖ Required

Feature	Description
Allow storage of content	<p>Specify whether the storage location can hold content items (i.e., items can be assigned directly to the location). The default is the configured default setting for the selected location type (see page 5-41), but you can override the default if required.</p> <p> Important: This setting <i>only</i> applies to this specific storage location, not to any child storage locations. It controls whether items can be assigned directly to the storage location (stored in it). You do not need to enable this check box for a storage location if any of its child locations will hold content. For example, you may have a storage location of type “Shelf” with a number of positions, each of which can hold content items. If you do not want any items to be directly assigned at the shelf level but only to the positions on a shelf (i.e., stored at a position, not on a shelf), then you set the shelf storage location to not allow storage of content, and the position storage location to allow storage.</p> <p>If you select this select box, all fields (except Requestor) below it become available.</p>
Status	<p>This field is available only for storage locations that can hold items. It enables you to specify the current status of the storage location. For more details about the storage status, refer to page 6-8.</p> <p>The default status is ‘Available’. If you do not select a specific status for a storage location, the status ‘Available’ is assumed.</p>
Requestor	<p>This field is available only if the storage location allows storage of content and the storage status is set to “Reserved.” It enables you to specify the user who reserved the storage location, either by entering it manually or by selecting it from the dropdown list of available users.</p>

Feature	Description
Location Holds	<p>This field is available only for storage locations that can hold items. It enables you to specify what type of physical content items are stored in the storage location. You can choose from all defined object types (see page 5-57).</p> <p> Note: You do not need to specify an object type here. The storage location can then hold any type of content. If you do select an object type, and you attempt to assign a physical item of a different object type to the storage location (see page 12-3), an error message is displayed and you cannot check in the physical item.</p>
Maximum Items Allowed	<p>This field is available only for storage locations that can hold items. It enables you to specify the maximum number of items that the storage location can hold. Physical Content Manager uses this number to track the space availability in the storage location.</p> <p> Note: If you do not specify a number, 1 (one) is assumed, which means that only a single item can be assigned to the storage location.</p>
Barcode	<p>This field is available only for storage locations that can hold items. It enables you so specify a unique barcode for the storage location. If you do not specify one manually, one is automatically assigned (a random, 19-digit number).</p> <p>❖ Maximum number of characters: 30</p>
Create button (Create page only)	Click this button to create the storage location.
Submit Update button (Edit page only)	Click this button to submit the updated location type definition.

Feature	Description
Reset button	If you are creating a new storage location, clicking this button resets the page to its initial default settings. If you are editing an existing storage location, this returns the original storage location settings before you made any modifications.
Quick Help button	Click this button to display context-specific help information about this page.

Menu Bar

There is a menu bar at the top of the Edit Storage page with the following options (depending on your assigned rights):

- ❖ **Edit**—This opens a submenu with the following options:
 - **Edit**—Choose this option to open the [Edit Storage Page](#).
 - **Block Storage**—Choose this option to [block](#) the storage location and prevent further physical items from being assigned to the storage location (see page 6-38). In essence, the “[Allow storage of content](#)” setting for the storage location is set to “No” (see page 6-18).
 - **Reserve Storage**—Choose this option to [reserve](#) the storage location for future storage of physical items (see page 6-39).
- ❖ **Delete**—Choose this option to delete the current storage location from the storage space hierarchy. You can delete a storage location only if it is empty (i.e., no physical items are assigned to it).
- ❖ **Storage Information**—Choose this option to display the [Storage Information Page](#) (page 6-30).
- ❖ **Create Storage Item**—Choose this option to [create a new storage location](#) below the current storage location (see page 6-33).
- ❖ **Labels**—This opens a submenu with the following options:
 - **Print Labels for Children**—Choose this option to [print barcode labels](#) for all child locations of the current storage location (see page 6-41). This option is available only for storage locations that have child locations. In addition, you need to have the PCM.Admin.PrintLabel [right](#) to see this option.

- **Print Label Including Children**—Choose this option to [print barcode labels](#) for the current storage location as well as all its child locations (see page 6-41). This option is available only for storage locations that can hold items and have child locations. In addition, you need to have the `PCM.Admin.PrintLabel` [right](#) to see this option.

CREATE BATCH STORAGE IMPORT FILE PAGE

Use the Create Batch Storage Import File page to define a new storage hierarchy by specifying a number of creation rules. These rules are then used to generate a file called *StorageImport.hda*, which can be [imported](#) to create the defined storage hierarchy (see page 7-7). This enables you to easily create structured storage space without having to define each storage location individually.



Note: You must have the `PCM.Admin.Manager` [right](#) to access the Create Batch Storage Import File page. By default, this right is assigned to the predefined ‘pcmadmin’ role.

To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Open the **Configuration** menu, and choose the **Batch Storage Creation** option.



Figure 6-9 Create Batch Storage Import File page



Location Type	Name Prefix	Start Number	Number Of Items	Allow Content	Number of Content Items Allowed	Object Type
▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	All ▼
▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	All ▼
▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	All ▼
▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	All ▼
▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	All ▼
▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	All ▼



Buttons: Create, Reset, Quick Help


Page Features

The table below describes the various features of the Create Batch Storage Import File page.

Feature	Description
Browse button	Click this button to open the Select Storage Location Dialog (page 6-29), where you can specify the location in the existing storage space that will hold the new storage hierarchy defined on this page.
Location Type	<p>Select the location type of each level in the storage hierarchy. You can choose from all defined location types (both predefined and custom).</p> <p> Important: You must obey the existing location type hierarchy. This means that you must start with the highest-level storage location and work your way down the hierarchy. You cannot add a parent location below a child location (for example, a shelf above a row). If you attempt to do this, error messages will be displayed when you import the <i>StorageImport.hda</i> storage definition file.</p>
Name Prefix	<p>Specify a prefix for the storage location name.</p> <p>The prefix is included in the name and description of the storage location: <i>[Name_Prefix]+[Sequential_Number]</i>.</p> <p> Note: If you do not specify a name prefix, the name and description of the storage location will consist of nothing but numbers (for example, “003”).</p>

Feature	Description
Start Number	<p>Specify the number that the number sequence should start with. For example, if you specify 5, then the number sequence will run '005', '006', '007' (with the default number of digits; see below), etc.</p> <p>The sequential number is included in the name and description of the storage location: <i>[Name_Prefix]+[Sequential_Number]</i>.</p> <p> Note: If you do not specify a number, 1 (one) is assumed.</p>
Number Of Items	<p>Specify how many instances of the storage location should be included in the storage space.</p> <p>If you do not provide a number, 1 (one) is assumed.</p> <p> Tech Tip: The default number of digits used in the numerical sequences is 3, which means that you will see names such as "Warehouse_001." If you want a different number of digits, you can modify the <code>AutoStorageNumberWidth</code> parameter in the <i>[CS_Dir]/custom/StorageCreationUtility/storagecreationutility_environment.cfg</i> file. Make sure to restart the content server after you change the parameter value.</p>

Feature	Description
Allow Content	<p>Select this checkbox if you allow items to be stored in the storage location (i.e., items can be assigned directly to the storage location).</p> <p> Important: This setting <i>only</i> applies to this specific storage location, not to any child storage locations. It controls whether items can be assigned directly to the storage location (stored in it). You do not need to enable this check box for a storage location if any of its child locations will hold content. For example, you may have a storage location of type “Shelf” with a number of positions, each of which can hold content items. If you do not want any items to be directly assigned at the shelf level but only to the positions on a shelf (i.e., stored at a position, not on a shelf), then you set the shelf storage location to not allow storage of content, and the position storage location to allow storage.</p>
Number of Content Items Allowed	<p>If you selected the “Allow Content” checkbox, specify the maximum number of items that the storage location can hold. Physical Content Manager uses this number to track the space availability in the storage location.</p> <p> Note: If you do not specify a number, 1 (one) is assumed, which means that only a single item can be assigned to the storage location.</p>

Feature	Description
Object Type	<p>If you selected the “Allow Content” checkbox, select the type of physical content items that the storage location can hold. You can choose from all defined object types (both predefined and custom).</p> <p> Note: If you do not select an object type, the storage location can hold any type of physical content. If you do select an object type, and you attempt to assign a physical item of a different object type to the storage location (see page 12-3), an error message is displayed and you cannot check in the physical item.</p>
Create	Click this button to create a <i>StorageImport.hda</i> file, which you can import into the existing storage hierarchy (see page 7-7).
Reset	Click this button to delete all field input and selections, and return the page to its initial situation (i.e., empty).
Quick Help button	Click this button to display context-specific help information about this page.



Note: See [Example: Creating a Batch of Storage Locations](#) (page 6-44) for a step-by-step procedure of adding a defined storage structure to Physical Content Manager’s storage environment.

See [Importing a Batch-Created Storage Hierarchy](#) (page 7-7) for a step-by-step procedure of importing a generated *StorageImport.hda* file into the existing storage space environment.

Considerations

Please note the following considerations with regard to batch creating storage locations:

- ❖ When defining a storage space, you must obey the existing location type hierarchy. This means that you must start with the highest-level storage location and work your way down the hierarchy. You cannot add a parent location below a child location

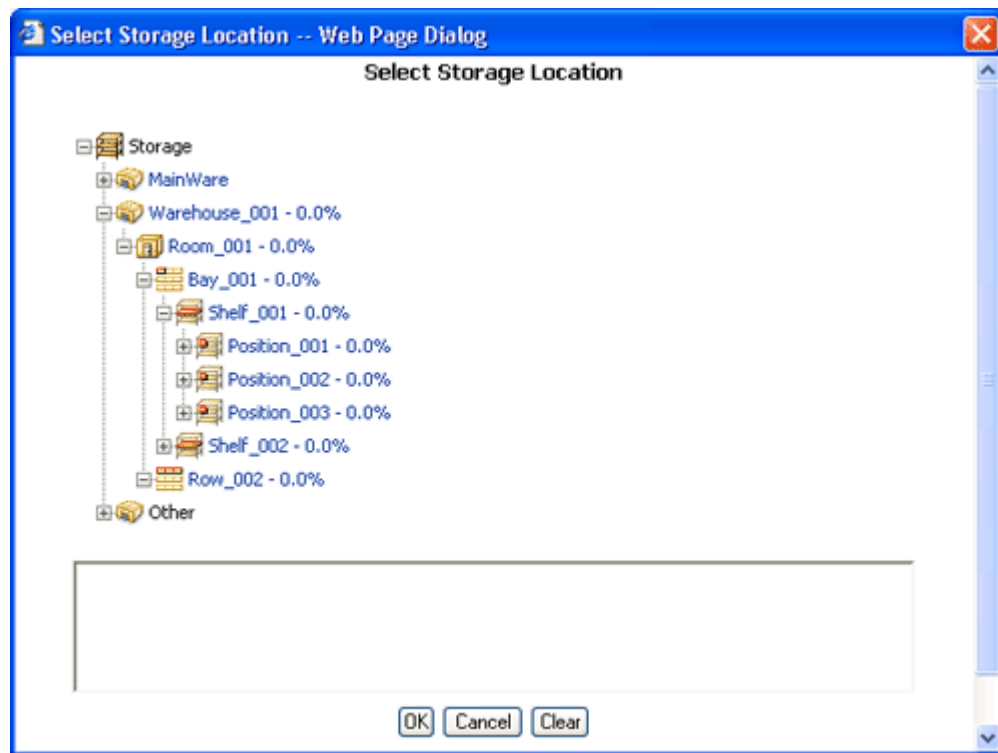
(for example, a shelf above a row). If you attempt to do this, error messages will be displayed when you [import](#) the *StorageImport.hda* storage definition file (see page 7-7).

- ❖ The name and description of each generated storage location is built from the name prefix (if specified) and a sequential number—for example, “Warehouse_001,” “R003,” or WH_NY-012.”
- ❖ The default number of digits used in the numerical sequences is 3, which means that you will see names such as “Warehouse_001.” If you want a different number of digits, you can modify the `AutoStorageNumberWidth` parameter in the `[CS_Dir]/custom/StorageCreationUtility/storagecreationutility_environment.cfg` file. Make sure to restart the content server after you change the parameter value.

SELECT STORAGE LOCATION DIALOG

Use the Select Storage Location dialog to select the location in the current storage environment that will hold the new storage hierarchy defined on the [Create Batch Storage Import File Page](#) (page 6-24). To access this dialog, click the **Browse** button on that page.

Figure 6-10 Select Storage Location dialog



The main box at the top shows the defined storage space environment. You can drill down the hierarchy to navigate to the storage location that you want to select. Once you select a location in the hierarchy, the box at the bottom shows the full navigation path to the selected location.

You can use the plus and minus icons in front of a storage location to unfold or collapse all its child locations.

When you have selected the desired location, click **OK** to return to [Create Batch Storage Import File Page](#) (page 6-24). You can click **Clear** to delete the current storage path and select a new one.

STORAGE INFORMATION PAGE

Use the Storage Information page to view information about an existing storage location.



Note: You must have the PCM.Storage.Read [right](#) to view information about a storage location. By default, both predefined physical content management roles ('pcmrequestor' and 'pcmadmin') have this right.

To access this page, complete the following steps:

1. Log into the content server.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The [Exploring “\[Location\]” page](#) (see page 6-12) for the top level of the storage hierarchy is displayed.



Note: You can also access the top-level storage exploring page from the [Configure Physical Content Management page](#) (page 5-2) (Configuration—Storage).

4. Navigate to the storage location whose properties you want to view, and click on the info icon (i). Alternatively, you can also choose **Storage Information** on the menu bar at the top of the page.



Note: You can also choose **Storage Information** from the actions icon menu (⋮) for a storage location in the list to edit that location’s properties.

Figure 6-11 Storage Information page

The screenshot shows a web interface titled "Storage Information". At the top, there is a navigation bar with buttons for "Edit", "Create", "Labels", "Delete", and "Storage Information". Below the navigation bar is a breadcrumb trail: "Storage --> Warehouse_001 --> Room_001 --> Bay_001 --> Shelf_001". The main content area displays the following properties for the selected storage location:

- Storage Name:** Shelf_001
- Description:** Shelf 1
- Location Type:**
- Allow storage of content:** Yes
- Status:** Available
- Requestor:**
- Location Holds:** Micro
- Maximum Items Allowed:** 10
- Barcode:** 8465326865986679088
- Space Available:** 10
- Space Used:** 0

An "OK" button is located at the bottom center of the page.

This page shows the current properties of the selected storage location, including the total available spaces (calculated from all child storage locations) and the spaces currently used. There is also a breadcrumb trail at the top of the page, which shows where the storage location is located in the storage space hierarchy.



Tech Tip: By default, the available storage space is recalculated once a day at midnight. This means that the displayed storage availability information may not be entirely up to date as the day progresses since it still reflects the situation from the night before. If you are an administrator with the PCM.Admin.Manager right, you can force a recalculation of the available storage space by running the “Process Storage Space Counts” [batch service](#) (see page 3-3).

Menu Bar

There is a menu bar at the top of the page with a number of options (depending on your assigned rights). The menu bar is identical to the one on the [Edit Storage Page](#) (page 6-19).

PHYSICAL ITEMS PAGES

This page lists all physical items contained in a storage location (and its child locations, if desired). It is essentially a [search results page](#) to a query (see page 13-6). You access this page by clicking either of the following links on any of the [Exploring pages](#) (see page 6-12):

- ❖ **List Physical Items that belong in [Storage_Location]**—If you click this link, a list is displayed of all items that have the specified storage location as their *permanent* location.
- ❖ **List Physical Items that are actually in [Storage_Location]**—If you click this link, a list is displayed of all items that have the specified storage location as their *current* location. This list does not include any items that would normally be in the storage location, but that are currently checked out.

If you want the list to include all physical items in the child locations of the current storage location, then select the **Include Child Storage Items** check box before clicking the link.

Figure 6-12 List Physical Items links on Exploring page

Delete						
<input type="checkbox"/>	Storage Name	Location Type	Description	Status	Space Used	Actions
<input type="checkbox"/>	Position_001	Position	Position 1	Available	0.0%	
<input type="checkbox"/>	Position_002	Position	Position 2	Available	0.0%	
<input type="checkbox"/>	Position_003	Position	Position 3	Available	0.0%	

[List Physical Items that belong in Shelf_001](#) [List Physical Items that are actually in Shelf_001](#)
 Include Child Storage Items

Figure 6-13 List of the physical items in a storage location

<input type="checkbox"/> Select All	Name	Title	Date	Author	Actions
<input type="checkbox"/>	MicroUnit_001	Introductory Physics Text Microfilm	2/27/07	sysadmin	
<input type="checkbox"/>	PhysicalUnit_001	Physics Classroom Equipment	2/27/07	sysadmin	

See [Search Results Page](#) (page 13-6) for a description of the features on this page.

CREATING A STORAGE LOCATION

Use this procedure to create a new storage location in the storage space hierarchy.



Note: You must have the PCM.Storage.Create [right](#) to create a storage location. By default, this right is assigned to the predefined ‘pcadmin’ role.

To create a storage location, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The [Exploring “\[Location\]” page](#) (see page 6-12) for the top level of the storage hierarchy is displayed.



Note: You can also access the top-level storage exploring page from the [Configure Physical Content Management page](#) (page 5-2) (Configuration—Storage).

4. Navigate to the storage space level—i.e., the [Exploring “\[Location\]” page](#) (see page 6-12)—where you want to create a new child storage location.
5. Choose **Create Storage Item** on the menu bar at the top of the page.



Note: You can also choose **Create Storage Item** from the actions icon menu () for a storage location in the list to add a new child storage location at that level.

The [Create Storage page](#) (page 6-18) is displayed.

6. Specify the storage location properties, and click **Create** when you are done.

The newly created storage location is now included in the [storage space hierarchy](#) (page 6-12) at its assigned level.

BATCH CREATING STORAGE LOCATIONS

Use this procedure to add a number of storage locations to the storage space hierarchy in a single batch. This is useful in situations where the storage hierarchy (or part of it) consists of a well-defined tree structure with consistent naming and numbering of its constituent objects. This procedure enables you to define this storage location structure in one operation, without having to define each object separately.



Note: You must have the `PCM.Admin.Manager` [right](#) to batch create storage locations. By default, this right is assigned to the predefined 'pcmadmin' role.

You do not add the defined objects to the storage hierarchy directly from this page. Rather, you specify the naming and numbering rules that should be used to create the storage locations. After you click **OK**, a file called *StorageImport.hda* is generated, which you can [import](#) into the existing storage hierarchy (see page 7-7).

To create a batch of storage locations, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.
The [Configure Physical Content Management page](#) is displayed (see page 5-2).
4. Open the **Configuration** menu, and choose the **Batch Storage Creation** option.
The [Create Batch Storage Import File Page](#) (page 6-24) is displayed.
5. Click the **Browse** button.
The [Select Storage Location dialog](#) (page 6-29) is displayed.
6. Navigate to the level in the storage hierarchy that the new storage location structure should be added to, and click **OK**.
7. Specify the rules and parameters that should be used to create the batch of storage locations. See [Create Batch Storage Import File Page](#) (page 6-24) for details.
8. Click **Create** when you are done to create the storage locations in accordance with the defined specifications, or click **Reset** to return the screen to its initial values.

A file called *StorageImport.hda* is generated, and a dialog opens which allows you to save this file to your hard drive. See [Importing a Batch-Created Storage Hierarchy](#) (page 7-7) for details on importing the generated *hda* file into an existing storage environment.

The newly created storage locations are now included in the [storage space hierarchy](#) (page 6-12) at their assigned level.

EDITING A STORAGE LOCATION

Use this procedure to edit the properties of an existing storage location. Depending on the storage location, you may not be able to edit all location properties.



Note: You must have the PCM.Storage.Edit [right](#) to edit a storage location. By default, this right is assigned to the predefined ‘pcadmin’ role.


To edit a storage location, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.


The [Exploring “\[Location\]” page](#) (see page 6-12) for the top level of the storage hierarchy is displayed.



Note: You can also access the top-level storage exploring page from the [Configure Physical Content Management page](#) (page 5-2) (Configuration—Storage).

4. Navigate to the storage location whose properties you want to edit, and click on the info icon (). Alternatively, you can also choose **Storage Information** on the menu bar at the top of the page.



Note: You can also choose **Storage Information** from the actions icon menu () for a storage location in the list to edit that location’s properties.

The [Storage Information Page](#) (page 6-30) is displayed.

5. Choose **Edit—Edit** from the menu bar.

The [Edit Storage page](#) (page 6-18) is displayed.

6. Modify the storage location properties as required, and click **Submit Update** when you are done.

A message is displayed stating that the storage location has been updated successfully, along with a list of the current storage location properties.

7. Click **OK**.

The [Exploring “\[Location\]” page](#) (see page 6-12) that you started from is displayed again.

VIEWING INFORMATION ON A STORAGE LOCATION

Use this procedure to view information about a storage location.



Note: You must have the `PCM.Storage.Read` right to view information about a storage location. By default, both predefined physical content management roles (‘pcmrequestor’ and ‘pcmadmin’) have this right.

To view information about a storage location, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The [Exploring “\[Location\]” page](#) (see page 6-12) for the top level of the storage hierarchy is displayed.



Note: You can also access the top-level storage exploring page from the [Configure Physical Content Management page](#) (page 5-2) (Configuration—Storage).

4. Navigate to the storage location whose properties you want to view, and click on the info icon (i). Alternatively, you can also choose **Storage Information** on the menu bar at the top of the page.



Note: You can also choose **Storage Information** from the actions icon menu (⋮) for a storage location in the list to edit that location’s properties.

The [Storage Information page](#) (page 6-30) is displayed listing the current storage location properties.

5. Click **OK** when you are done.

The [Exploring “\[Location\]” page](#) (see page 6-12) that you started from is displayed again.

DELETING A STORAGE LOCATION

Use this procedure to delete a storage location from the storage space hierarchy. A storage location must be empty before you can delete it. A location is considered empty if it does not contain any items. If a storage location has child storage locations that are all empty, you can delete the entire branch. If you attempt to delete a non-empty storage location, an error message is displayed.



Note: You must have the `PCM.Storage.Delete` [right](#) to delete a storage location. By default, this right is assigned to the predefined ‘pcadmin’ role.



Important: You cannot delete the predefined “Other” storage location, even if it is empty.


To delete a storage location, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.


The [Exploring “\[Location\]” page](#) (see page 6-12) for the top level of the storage hierarchy is displayed.



Note: You can also access the top-level storage exploring page from the [Configure Physical Content Management page](#) (page 5-2) (Configuration—Storage).

4. Navigate to the storage location you want to delete, and click on the info icon (). Alternatively, you can also choose **Storage Information** on the menu bar at the top of the page.



Note: You can also choose **Storage Information** from the actions icon menu () for a storage location in the list to edit that location’s properties.

The [Storage Information Page](#) (page 6-30) is displayed.

5. Click **Delete** on the menu bar at the top of the page.



Note: You can also delete multiple storage locations at once from the [exploring pages](#) (see page 6-12) by selecting their check boxes and clicking **Delete** in the table menu bar.

If the storage location is empty, it is immediately deleted from the storage space hierarchy (without any further warnings), and the Exploring page is refreshed.

If the storage location is not empty, an error message is displayed and it will not be deleted.

BLOCKING A STORAGE LOCATION

Use this procedure to block a storage location. If you block a storage location, it is not possible to store any items in the storage location and all its child locations, even if there is space available. You can only block empty storage locations. When you block a storage location, its “[Allow storage of content](#)” setting is set to “No” (see page 6-18).

Blocking a storage location may, for example, be useful to create a “dummy” storage location in a situation where a bay cannot be used because there is a support pillar in front of it, but you do not want to break the matching bay numbering across multiple rows.



Note: You must have the PCM.Storage.Block [right](#) to block a storage location. By default, this right is assigned to the predefined ‘pcmadmin’ role.

Blocking a Storage Location

To block a storage location, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The [Exploring “\[Location\]” page](#) (see page 6-12) for the top level of the storage hierarchy is displayed.



Note: You can also access the top-level storage exploring page from the [Configure Physical Content Management page](#) (page 5-2) (Configuration—Storage).

4. Navigate to the storage space level—i.e., the [Exploring “\[Location\]” page](#) (see page 6-12)—that includes the storage location you want to block.
5. Choose **Edit—Block Storage** on the actions icon menu ().

The [Exploring “\[Location\]” page](#) (see page 6-12) that you started from is displayed again, and content can no longer be assigned to the storage location. If the status column previously showed “Available,” it is now empty. Also, if you look at the [information page](#) of the storage location (see page 6-30), the “Allow storage of content” field is set to “No.”

Unblocking a Storage Location

To cancel the blocked status of a storage location and allow storage of content again, you need to [edit the storage location](#) (see page 6-35) and set its “Allow storage of content” setting to “Yes.” After you unblock a storage location, its status column on the [Exploring “\[Location\]” pages](#) (see page 6-12) shows “Available” again (it was empty while the storage location was blocked).

RESERVING A STORAGE LOCATION

Use this procedure to reserve a storage location for future storage of physical content items. This may be useful if you have groups of similar items that you want to store together as they come in for storage. If you reserve a storage location, all its child locations are also reserved. Only an administrator or the person who reserved a storage location can add items to it.



Note: You must have the `PCM.Storage.Reserve` [right](#) to reserve a storage location. By default, both predefined physical content management roles (‘pcmrequestor’ and ‘pcmadmin’) have this right.

Reserving a Storage Location


To reserve a storage location, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The [Exploring “\[Location\]” page](#) (see page 6-12) for the top level of the storage hierarchy is displayed.







Note: You can also access the top-level storage exploring page from the [Configure Physical Content Management page](#) (page 5-2) (Configuration—Storage).

4. Navigate to the storage space level—i.e., the [Exploring “\[Location\]” page](#) (see page 6-12)—that includes the storage location you want to reserve.
5. Choose **Edit—Reserve Storage** on the actions icon menu (.

The [Exploring “\[Location\]” page](#) (see page 6-12) that you started from is displayed again, and the storage location now shows “Reserved” in its status column, with the name of the user who made the reservation in parentheses:

Figure 6-14 Reserved status of storage location

Available	0.0%	 
Reserved (sysadmin)	0.0%	 

Canceling the Reservation of a Storage Location


To cancel the reserved status of a storage location, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Open the **Browse Content** tray or top menu.
4. Click **Browse Storage**.

The [Exploring “\[Location\]” page](#) (see page 6-12) for the top level of the storage hierarchy is displayed.



Note: You can also access the top-level storage exploring page from the [Configure Physical Content Management page](#) (page 5-2) (Configuration—Storage).

5. Navigate to the storage space level—i.e., the [Exploring “\[Location\]” page](#) (see page 6-12)—that includes the storage location whose reserved status you want to cancel.
6. Choose **Edit—Cancel Request** on the actions icon menu ().

The [Exploring “\[Location\]” page](#) (see page 6-12) that you started from is displayed again, and the storage location no longer shows “Reserved” in its status column.

VIEWING ALL ITEMS IN A STORAGE LOCATION

Use this procedure to view all items currently contained in a storage location.



Note: You must have the `PCM.Storage.View right` to view the physical items in a storage location. By default, both predefined physical content management roles (‘pcmrequestor’ and ‘pcmadmin’) have this right.

To view all items in a storage location, complete the following steps:

1. Log into the content server.

2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The [Exploring “\[Location\]” page](#) (see page 6-12) for the top level of the storage hierarchy is displayed.



Note: You can also access the top-level storage exploring page from the [Configure Physical Content Management page](#) (page 5-2) (Configuration—Storage).

4. Navigate to the storage space level—i.e., the [Exploring “\[Location\]” page](#) (see page 6-12)—that includes the storage location whose items you want to view.
5. At the bottom of the page, click either of the following links:
 - **List Physical Items that belong in [Location]**—This lists all items that have the specified storage location as their *permanent* location.
 - **List Physical Items that are actually in [Location]**—This lists all items that have the specified storage location as their *current* location. This list does not include any items that would normally be in the storage location, but that are currently checked out.

If you want the list to also show all items in the child locations of the current storage location, make sure that you select the **Include Child Storage Items** check box. This check box is available only if the current storage location has child locations.

The [Physical Items Pages](#) (page 6-32) is displayed.

PRINTING LABELS FOR STORAGE LOCATIONS

Use this procedure to create a [label for a storage location](#) (see page 9-8 for more information on these labels). The label file contains the barcodes and other information for the current storage location and all its child storage locations (if any). Only storage locations that can hold content items are included (in other words, locations that have barcodes). This means that any “intermediate” storage levels are skipped if they are not set up to hold content. By default, the label for a storage location contains a barcode that uniquely represents the location, the location’s name, its description, and its location type.

The format of the label file depends on the Report Label Format setting on the [Configure Physical Content Manager page](#) (see page 5-2).



Note: If the generated label file is in the PDF format, you need at least version 6.0 of the Acrobat software to view it. It cannot be accessed using Adobe Acrobat 5.x or earlier.



Note: You must have the `PCM.Admin.PrintLabel` right to create storage location labels. By default, this right is assigned to the predefined ‘pcmadmin’ role.

To create a label for a storage location, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The [Exploring “\[Location\]” page](#) (see page 6-12) for the top level of the storage hierarchy is displayed.



Note: You can also access the top-level storage exploring page from the [Configure Physical Content Management page](#) (page 5-2) (Configuration—Storage).

4. Navigate to the storage space level—i.e., the [Exploring “\[Location\]” page](#) (see page 6-12)—for which you want to print a label.
5. Depending on the current storage location, select any of the following options actions icon menu (📄) or the Labels menu at the top of the page:
 - **Labels > Print Labels for Children**—This option is displayed if the current storage location cannot hold items. Choose this option to create labels for all its child locations that can hold items.
 - **Labels > Print Label**—This option is displayed if the current storage location can hold items and does not have any child locations. Choose this option to create a label for the current storage location.
 - **Labels > Print Label Including Children**—This option is displayed if the current storage location can hold items and has child locations. Choose this option to create labels for the current storage location as well as all its child locations.

A label file called “ResultSetReport.pdf” or “ResultSetReport.plb” is created (depending on the configured file format), and a dialog is displayed in which you can open or save the generated file.



Note: You can also create a label for a storage location from the Actions dropdown menu or titlebar menu on its [information page](#) (see page 6-30). This menu will contain an option to print a label only if the storage location can hold content.

EXAMPLE: CREATING A SINGLE STORAGE LOCATION

This example explains how to create a storage location called “Warehouse_003,” which is of location type Warehouse and resides at the top level of the storage hierarchy.

To create this storage location, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The [Exploring “\[Location\]” page](#) (see page 6-12) for the top level of the storage hierarchy is displayed.



Note: You can also access the top-level storage exploring page from the [Configure Physical Content Management page](#) (page 5-2) (Configuration—Storage).

4. Choose **Create Storage Item** on the menu bar at the top of the page.

The [Create Storage page](#) (page 6-18) is displayed.

5. Enter “Warehouse_003” as the storage name and description.
6. Select “Warehouse” as the location type.
7. Click **Create**.

The newly created storage location is now included in the [storage space hierarchy](#) (page 6-12) at the top level:

Before:



After:



EXAMPLE: CREATING A BATCH OF STORAGE LOCATIONS

This example explains how to create the definition file for a storage space structure and then import this file to create the defined storage space within Physical Content Manager's [storage environment](#). The storage space structure will consist of one warehouse at the top level of the storage environment, with a number of subordinate storage locations. Each of the lowest-level locations (Position) may hold five items, which can be of any [object type](#).

Creating the Batch Storage Definition File

To create the batch storage definition file, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Open the **Configuration** menu, and choose the **Batch Storage Creation** option.

The [Create Batch Storage Import File Page](#) (page 6-24) is displayed.

5. Click **Browse** to select the highest point of the hierarchy. If you do not select one the 'Storage' level is defaulted.

The [Select Storage Location Dialog](#) (page 6-29) is displayed.

6. Provide the creation rules as shown:

Create Batch Storage Import File

Select Storage Start Point:

Location Type	Name Prefix	Start Number	Number Of Items	Allow Content	Number of Content Items Allowed	Object Type
Warehouse	Warehouse_	1	1	<input type="checkbox"/>		All
Room	Room_	1	2	<input type="checkbox"/>		All
Row	Row_	1	2	<input type="checkbox"/>		All
Bay	Bay_	1	2	<input type="checkbox"/>		All
Shelf	Shelf_	1	2	<input type="checkbox"/>		All
Position	Position_	1	3	<input checked="" type="checkbox"/>	5	All

7. Click **Create**.

A file download dialog is displayed.

8. Click **Save** to store the generated *StorageImport.hda* file on your local hard drive.

Importing the Batch Storage Definition File

To import the batch storage definition file into Physical Content Manager, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **Administration** tray or top menu.
3. Click **Configure Records Management**.

The Configure Records Management page is displayed.

4. Choose **Tasks—Import/Export**.

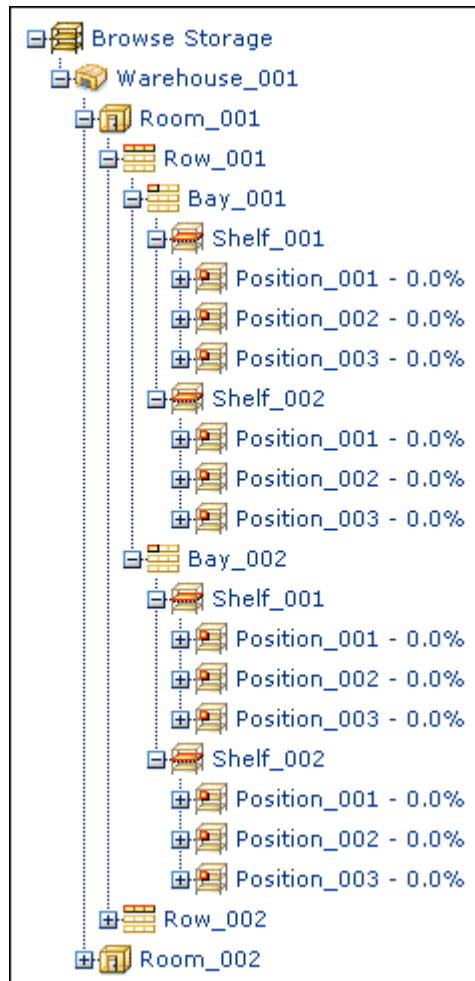
The [Import/Export Content and Record Archive page](#) (page 7-2) is displayed.

5. Unselect all items (including those under ‘Show External Sources’) except for **Include Storage**.
6. Click **Browse** next to the **Archive File** box to select the *StorageImport.hda* file that you saved earlier.
7. After you have selected the file, click **Import**. The import adds the defined storage space to the existing storage hierarchy at the location that was selected.

Viewing the New Storage Space Hierarchy

After importing the generated *StorageImport.hda* file, you will see the following storage hierarchy (under the **Browse Content** tray):

Figure 6-15 Result of example batch storage definition



Please note that only the first room and row are fully expanded here. The other rooms and rows are exact images of this structure, but with their own numbering sequences.

EXPORTING AND IMPORTING PCM SETTINGS AND DATA

OVERVIEW

This section deals with exporting Physical Content Manager settings and importing them into other Physical Content Manager instances in order to duplicate the PCM space management definitions and other configuration settings. It covers the following topics:

Concepts

- ❖ [About Importing and Exporting](#) (page 7-2)

Interface

- ❖ [PCM Items on Import/Export Content and Record Archive Page](#) (page 7-2)

Tasks

- ❖ [Exporting PCM Settings and Data](#) (page 7-5)
- ❖ [Importing PCM Settings and Data](#) (page 7-6)
- ❖ [Importing a Batch-Created Storage Hierarchy](#) (page 7-7)

ABOUT IMPORTING AND EXPORTING

If you set up a Physical Content Manager environment on one computer (including storage space definitions, location types, and the like), you may want to copy this configuration information to another computer—for example, from a development machine to a production machine. You can easily accomplish this using Records Manager’s import and export features. You can also use these features to back up or restore your space management definitions and other configuration settings. The export feature copies a variety of configuration settings to a separate *.hda* file that can be imported into another Physical Content Manager instance or stored in a safe location for backup purposes. The *.hda* file is a plain-text, serialized data file that can be opened in any text editor.



Note: You must have the Admin.FilePlanArchive right in Records Manager to access its export and import features. By default, this right is assigned to the predefined ‘rmaadmin’ role in Records Manager. To export archives, having the ‘admin’ role in Content Server is sufficient.

If Physical Content Manager is installed correctly, the [Import/Export Content and Record Archive page](#) (see page 7-2) in Records Manager include a number of PCM-related items that you can select to be included in the export or import:

- ❖ [location types](#) (see page 5-40)
- ❖ [storage space definitions](#) (see chapter 6)
- ❖ [custom PCM metadata](#) (see page 5-79)
- ❖ [reservations](#) (see chapter 10)



Note: The export feature copies the space management definitions (i.e., the defined setup and hierarchy of warehouses, rooms, bays, etc.), but none of the metadata of the items stored at these locations.

PCM ITEMS ON IMPORT/EXPORT CONTENT AND RECORD ARCHIVE PAGE

If Physical Content Manager is installed correctly, the Export Content and Record Archive page in Records Manager includes a number of PCM-related items that you can select to be included in the export file.

Figure 7-1 PCM items on Import/Export Content and Record Archive page

Import/Export Content and Record Archive

- Choose which types of objects you wish to import/export.
- If importing, select an archive file from your local system.
- Click 'Import' or 'Export'
- If exporting you will save the archive to your local system.

Attempt Update

Retention Schedules Objects

- Include Location Types
- Include Storage
- Include Custom PCM Metadata
- Include Supplemental Markings

Content Related Objects

- Include Reservations
- Include Dispositions History

[Show External Sources](#)

Archive File

To access the Import/Export Content and Record Archive page in Records Manager, complete the following steps:

1. Log into the content server as a records administrator (with the Admin.FilePlanArchive right).
2. Open the **Administration** tray or top menu.
3. Click **Configure Records Management—Tasks—Import/Export**.



Note: For further details on the Export Content and Record Archive Page, refer to the *Records Manager System Maintenance Guide*.

Retention Schedules Objects

The following PCM-related items are included in the Retention Schedules Objects area of the Import/Export Content and Record Archive page:

❖ **Include Location Types:**

If you select this option, all defined location types currently in the system are included in the export.

❖ **Include Storage:**

If you select this option, all defined storage space currently in the system is included in the export.



Note: The export feature copies the space management definitions (i.e., the defined setup and hierarchy of warehouses, rooms, bays, etc.), but none of the metadata of the items stored at these locations.

❖ **Include Custom PCM Metadata:**

If you select this option, all defined custom metadata for Physical Content Manager is included in the export.

Content-Related Objects

The following PCM-related items are included in the Content Related Objects area of the Export Content and Record Archive page:

❖ **Include Reservations:**

If you select this option, all reservations currently in the system are included in the export.

❖ **Include Metadata of ‘Physical’** [under ‘Show/Hide External Sources’]

If you select this option, all metadata for physical content items in the system is included in the export.

❖ **Include Dispositions History of ‘Physical’** [under ‘Show/Hide External Sources’]

If you select this option, the complete history of all disposition actions performed on physical content items in the system is included in the export.



Note: If more Records Manager add-ons for external content are installed, the external sources list will include metadata and disposition history options for these sources as well.

Select a check box to include the specified item in the export archive, or clear it to exclude it.

EXPORTING PCM SETTINGS AND DATA

Use this procedure to export Physical Content Manager configuration settings, either for import into another server instance or for backup purposes. You can export the current reservations, the storage space definitions, and the custom PCM metadata. You can export these items separately or all together.



Note: You must have either the 'admin' role in Content Server or the Admin.FilePlanArchive right in Records Manager to export an archive. By default, the Admin.FilePlanArchive right is assigned to Records Manager's predefined 'rmaadmin' role. Please note that the predefined 'pcmadmin' role in Physical Content Manager does not have this right.

To export PCM settings, complete the following steps:

1. Log into the content server as a records administrator (with the Admin.FilePlanArchive right).
2. Open the **Administration** tray or top menu.
3. Click **Configure Records Management**.

The Configure Records Management page is displayed.

4. Choose **Tasks—Import/Export**.

The [Import/Export Content and Record Archive page](#) (page 7-2) is displayed.

5. Select all items that should be included in the export.
6. Click **Export**.

The File Download dialog is displayed.

7. To save the archive, click **Save**.

The Save As dialog is displayed.

8. Specify a name for the archive, and navigate to the location where you want to save the *.hda* archive file

9. Click **Save**.

The file is saved to the specified location, and you return to the Export Content and Record Archive page.

IMPORTING PCM SETTINGS AND DATA

Use this procedure to import an archive file that was exported using Records Manager's export features. For Physical Content Manager, you can import the reservations, storage space definitions, and custom PCM metadata included in the archive file. You can import these items separately or all together.



Note: You must have the Admin.FilePlanArchive right in Records Manager to import PCM settings. If you want to import the dispositions history, you must also have the Admin.PerformActions right in Records Manager. By default, these rights are assigned to the predefined 'rmaadmin' role in Records Manager. Please note that the predefined 'pcmadmin' role in Physical Content Manager does not have this right.

To import PCM settings, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **Administration** tray or top menu.
3. Click **Configure Records Management**.

The Configure Records Management page is displayed.

4. Choose **Tasks—Import/Export**.

The [Import/Export Content and Record Archive page](#) (page 7-2) is displayed.

5. Select all items that should be included in the import, and specify whether you want to update existing items or leave them untouched.
6. Click **Browse** next to the **Archive File** box to select the archive file (*.hda*) you want to import.
7. After you have selected the file, click **Import**. The import adds all new items and updates any existing ones, if applicable. The results of the imported archive are tracked in Records Manager's audit trail for the enabled actions.

IMPORTING A BATCH-CREATED STORAGE HIERARCHY

Use this procedure to import a storage hierarchy definition file (*StorageImport.hda*) that was created using the [batch storage creation](#) feature (see page 6-24).



Note: You must have the Admin.FilePlanArchive right in Records Manager to import a storage hierarchy definition file. By default, this right is assigned to the predefined ‘rmaadmin’ role in Records Manager. Please note that the predefined ‘pcmadmin’ role in Physical Content Manager does not have this right.

To import a storage hierarchy definition file, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **Administration** tray or top menu.
3. Click **Configure Records Management**.
The Configure Records Management page is displayed.
4. Choose **Tasks—Import/Export**.
The [Import/Export Content and Record Archive page](#) (page 7-2) is displayed.
5. Make sure that the “Include Storage” checkbox is selected. You do not have to unselect all the other items; they will simply be ignored as none of them are included in the *StorageImport.hda* file.
6. Click **Browse** next to the **Archive File** box to select the *StorageImport.hda* archive file that was created when you batch-created the storage hierarchy.
7. After you have selected the file, click **Import**. The import adds the storage hierarchy contained in the *StorageImport.hda* file to the existing storage space at the location specified in the *hda* file.

WORKING WITH BARCODES

OVERVIEW

This section deals with processing barcode files which are generated by barcode devices that scan the storage information contained in barcodes on physical content items or storage containers. It covers the following topics:

- ❖ [About Barcodes](#) (page 8-1)
- ❖ [Barcode Files](#) (page 8-3)
- ❖ [Barcode File Actions](#) (page 8-3)
- ❖ [Loading Barcode Information Using the Barcode Utility](#) (page 8-4)
- ❖ [Processing Barcode Files Manually](#) (page 8-4)

ABOUT BARCODES

Barcodes are machine-readable symbols used to store bits of data. In the context of physical content management, they can be used for purposes of identification, inventory, tracking, and reservation fulfillment.

Figure 8-1 Example of barcode



Barcodes can be printed on [labels](#) (see chapter 9) that can be attached to physical content items or storage containers holding such items (for example, a box). This helps you keep track of their location and status. You can also create [user labels](#), which help you process reservation requests by users.

Technical Considerations

Please note the following technical considerations with regard to barcoding:

- ❖ Physical Content Manager uses the Code 3 of 9 barcoding standard (also called Code 39). This is a widely used standard which produces alphanumeric barcodes that can store upper-case characters, decimal numbers, and some punctuation characters (dash, period, dollar sign, slash, percent sign, and plus symbol).
- ❖ All lower-case letters are automatically converted to upper case. For example, if a user login is 'jsmith', then its barcode value is 'JSMITH'.
- ❖ Any accented letters and double-byte characters (for example, Japanese and Korean) are encoded in their hexadecimal values. For example, if a user login is 'kmüller', then its barcode value is 'KMC39CLLER' (Ü = hex C39C). This means that the barcode length will increase as multiple hexadecimal characters are used to represent each accented letter or double-byte character.
- ❖ Barcode values for users default to their login names. You can override this behavior for a user by [setting a specific, unique barcode value](#) for that user in Content Server's User Admin utility (see page 5-88).

Loading Barcode Information Into PCM

After scanning barcode information using a barcode reader, you can load this information into Physical Content Manager, which prevents you from having to enter the information manually. This eliminates many errors and often saves time and money, and is especially useful if you need to process large numbers of items (for example, during the initial Physical Content Manager implementation).



Note: For details on the barcode scanners supported by the Physical Content Manager software, refer to the *Universal Records Management Installation Guide*.

There are two ways to load barcode information into Physical Content Manager:

- ❖ [Directly using the PCM Barcode Utility software](#) (see page 8-4)
- ❖ [Manually by processing generated barcode files](#) (see page 8-4)

BARCODE FILES

Barcode files are generated by barcode scanners which read storage information from [barcode labels](#) (see chapter 9) and write this information to a file. You can use the optional [PCM Barcode Utility](#) to directly load barcode information into Physical Content Manager (see appendix B), or you can process the barcode file manually.

Barcode files are plain-text files that can be viewed using any text editor. Figure 8-2 shows an example of a barcode file.



Caution: Barcode files are created by barcode scanners and processed by Physical Content Manager, and there is normally no reason to view or modify barcode files.

Figure 8-2 Example of barcode file

```
H 20050721130204 00 0000000000
20050721130145 00 2000
20050721130151 00 +W1R1R1B1S1P3
20050721130152 00 B3
20050721130153 00 2000
20050721130154 00 +W1R1R1B1S1P4
20050721130156 00 B4
T 000
```

BARCODE FILE ACTIONS

When a barcode file is processed ([automatically](#) or [manually](#)), one of three actions will be performed (specified for each item in the [barcode file](#)):

- ❖ [Check In](#) (page 8-3)
- ❖ [Check Out](#) (page 8-4)
- ❖ [Set Home & Actual](#) (page 8-4)

Check In

The Check In barcode action assigns an item to the location specified in the barcode file for that item. Please note that it is only the current location that is set, not the permanent location. Both the location and the item must already exist in Physical Content Manager. If either does not exist, an error is reported.

Check Out

The Check Out barcode action checks an item out to the user specified in the barcode file for that item (typically obtained by scanning a [user label](#)). Please note that the user does not need to exist in the content server. The status for the item is set to “Checked Out” and its checkout user to the specified user (both values are shown on the [Physical Item Information page](#); see page 12-11). The item’s current location is automatically set to the value of the [Deliver To Location field](#) for the associated reservation request (if there is one). If no value was entered in that field or if there is no reservation request, the current location is set to “OTHER,” and the [Location Comment](#) field will show the name of the checkout user.

Set Home & Actual

The Set Location barcode action assigns an item to the current and permanent locations specified in the barcode file for that item. This enables you to move an item to a different location. Both the locations and the item must already exist in Physical Content Manager. If any of them do not exist, an error is reported.

LOADING BARCODE INFORMATION USING THE BARCODE UTILITY

You can directly upload a barcode file from a barcode scanner to the Physical Content Manager application using the optional PCM Barcode Utility. The installer for this software is included on the Physical Content Manager distribution media, and, after installation of the PCM software, also at *[CS_Instance_Dir]/custom/PhysicalContentManager/Client/*. See [Appendix B \(Using the Barcode Utility\)](#) for more information.

PROCESSING BARCODE FILES MANUALLY

This section covers the following topics:

- ❖ [About Processing Barcode Files](#) (page 8-5)
- ❖ [Barcode Processing Page](#) (page 8-5)
- ❖ [Barcode File Processed Page](#) (page 8-6)
- ❖ [Processing a Barcode File](#) (page 8-8)

About Processing Barcode Files

You can [directly upload information](#) from a barcode scanner into Physical Content Manager using the optional PCM Barcode Utility (see page 8-4), but you can also process barcode files manually in the Physical Content Manager user interface.



Note: You must have the PCM.Barcode.Process [right](#) to process barcode files in Physical Content Manager. By default, this right is assigned to the predefined 'pcadmin' role.



Note: You can also process barcode data files using the optional Barcode Utility. For details, refer to [Appendix B \(Using the Barcode Utility\)](#).

Barcode Processing Page

Use the Barcode Processing page to select a barcode file to be processed, and process that file.



Note: You must have the PCM.Barcode.Process [right](#) to access the Barcode Processing page. By default, this right is assigned to the predefined 'pcadmin' role.

To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) (page 5-2) is displayed.

4. Click **Process Barcode File** on the top menu bar.

Figure 8-3 Barcode Processing page

The screenshot shows a web interface titled "Barcode Processing". Below the title is a text input field with the label "* Select File to Process" and a "Browse..." button to its right. Below the input field are three buttons: "Process File", "Reset", and "Quick Help".

Page Features

The table below describes the various features of the Barcode Processing page.

Feature	Description
Select File to Process	Enter a barcode file to be processed, or use the Browse button to select a file.
Browse	Click this button to open a file selection dialog, where you can navigate to a barcode file and select it for processing.
Process File	Click this button to start the analysis and processing of the selected barcode file.
Reset	Click this button to return to its initial default settings. No barcode file is processed.
Quick Help	Click this button to display context-sensitive help information on this page.

Barcode File Processed Page

The Barcode File Processed page is displayed after a barcode file has been selected (on the [Barcode Processing page](#)) and processed. It shows information about all the items in the barcode file, the actions performed on them, and any status and error messages.

Figure 8-4 Barcode File Processed page

Barcode File Processed Found 0 potential items


Thumbnail View Headline View

Date	Action	Object Type	Barcode	Location Type	Location Barcode	Message
07/21/2005 13:01:37	Check In		1		1	Error Occurred ⓘ
07/21/2005 13:01:38	Check In		2		1	Error Occurred ⓘ
07/21/2005 13:01:39	Check In		3		1	Error Occurred ⓘ
07/21/2005 13:01:40	Check In		4		1	Error Occurred ⓘ
07/21/2005 13:01:40	Check In		5		1	Error Occurred ⓘ

OK

Page Features

The table below describes the various features of the Barcode File Processed page.

Feature	Description
Date	This is the date and time that the item was read by the barcode scanner.
Action	This is the action that was performed on the item in the barcode file (as specified in the barcode file). See page 8-3 for further details.
Object Type	This is the object type of the item (for example, “Box”). See page 12-6 for further details.
Barcode	This is the barcode of the item as read by the barcode scanner.
Location Type	This is the location type of the item (for example, “Position”). See page 6-4 for further details.
Location Barcode	This is the barcode of the location that the item should be assigned to. See page 6-18 for further details.
Message	This field shows “Error Occurred” if the action was not completed successfully for an item. If you click on the info icon () , a popup dialog is displayed with more specific information about the error message.

Menu Bar

Depending on your assigned rights, there may be a menu bar with the following options:

- ❖ **Thumbnail View**—Choose this option to display the page in thumbnail view.
- ❖ **Headline View**—Choose this option to display the page in headline view.

Processing a Barcode File

Use this procedure to process a barcode file which contains barcode information obtained using a barcode scanner.



Note: You must have the PCM.Barcode.Process [right](#) to process barcode files. By default, this right is assigned to the predefined 'pcmadmin' role.

To process a barcode file, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) (page 5-2) is displayed.

4. Click **Process Barcode File** on the top menu bar.


The [Barcode Processing Page](#) (page 8-5) is displayed.

5. Click the **Browse** button to select a barcode file to be processed.

A file selection dialog is opened.

6. Navigate to the barcode file to be processed, select it, and close the file selection dialog.

7. Click **Process File**.

8. The barcode file is processed, and the [Barcode File Processed Page](#) (page 8-6) is displayed. If any errors occurred, these are reported in the Message column. You can click the info icon () to see more specific information about the error message.

9. After you are done viewing the results of the barcode processing, click **OK** to return to the [Barcode Processing Page](#) (page 8-5).

WORKING WITH LABELS

OVERVIEW

This section deals with creating labels. It covers the following topics:

- ❖ [About Labels](#) (page 9-1)
- ❖ [User Labels](#) (page 9-3)
- ❖ [Storage Location Labels](#) (page 9-8)
- ❖ [Physical Item Labels](#) (page 9-11)

ABOUT LABELS

Physical Content Manager enables you to create a number of labels that can be used for various purposes including tracking, storage management, and reservation fulfillment.

There are three types of labels:

- ❖ [User Labels](#) (page 9-3)
- ❖ [Storage Location Labels](#) (page 9-8)
- ❖ [Physical Item Labels](#) (page 9-11)



Note: You need to have the PCM.Admin.PrintLabel [right](#) to create labels. By default, this right is assigned to the predefined 'pcmadmin' role. If you do not have this right, no label options will be available to you in the user interface.

Label Format

The format of the generated labels is either Adobe Acrobat (PDF) or Physical Content Manager's own report format (PLB), depending on the Report Label Format setting on the [Configure Physical Content Manager page](#) (see page 5-2). The PCM report format is an XML-based, plain-text data file with file extension PLB (for labels) or PRT (for reports) that can be viewed and printed using the [Print Report Utility](#), which can be installed from the PCM distribution media and also from `[CS_Instance_Dir]/custom/PhysicalContentManager/Client`. For further details on this utility, refer to [Appendix A \(Using the Print Report Utility\)](#).

PDF Labels

The layout and contents of labels in the PDF format are controlled by label templates. These are plain-text HTML files with Idoc Script code embedded in them, much like regular Content Server pages. This means that they can be customized in much the same way as Content Server pages. The label template files are located at `[CS_Instance_Dir]/custom/PhysicalContentManager/templates/`. The following label templates are used:

- ❖ **print_user_barcode_label.htm**—This is the template for [user labels](#) (page 9-3).
- ❖ **print_storage_barcode_label.htm**—This is the template for [storage location labels](#) (page 9-8).
- ❖ **print_external_item_barcode_label.htm**—This is the template for [physical item labels](#) (page 9-11).



Note: For more information on customizations using Idoc Script, refer to the Content Server developer documentation and to the readme file provided with the ReportMaker component. You can find this file at `[CS_Instance_Dir]/custom/ReportMaker/readme.htm`. If required, you may also want to seek the assistance of Oracle's support services.

PLB Labels

The layout and contents of labels (in PLB data files) can be modified using the Crystal Report Writer application. See [Appendix A \(Using the Print Report Utility\)](#) for further details.

USER LABELS

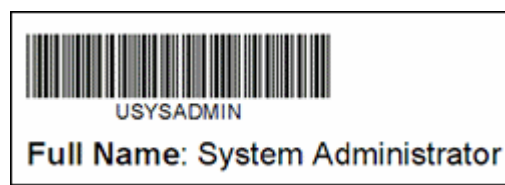
This section covers the following topics:

- ❖ [About User Labels](#) (page 9-3)
- ❖ [Print User Labels Page](#) (page 9-5)
- ❖ [Creating User Labels](#) (page 9-7)

About User Labels

Physical Content Manager enables you to print barcode labels for users, which can be used for purposes of tracking and reservation fulfillment.

Figure 9-1 Sample user label



By default, the label provides the following information:

- ❖ a barcode representing the user's login name (or barcode value, if specified),
- ❖ the login name or barcode value as readable text immediately below the barcode (in all upper-case letters, preceded by the letter 'U'), and
- ❖ the user's full name.

Make sure that you run the Update Users with no Barcodes [batch service](#) before printing user labels for the first time. This action automatically creates barcode values for all users in your system that do not yet have a barcode value assigned to them. If any users in your system do not have a barcode value and you create user labels, the generated PDF file is reported to be corrupt.

You can run the Update Users with no Barcodes service under External Content—Configure Physical Content—Batch Services. The batch services are not displayed by default; you need to enable them on the [Configure Physical Content Management page](#) (see page 5-2).



Tech Tip: Any lower-case letters in the login name of a user are automatically converted to upper case. Also, if a login name contains any accented letters (for example, ‘kmüller’), then these letters are represented as hexadecimal values (for example, ‘KMC39CLLER’, where C39C is the hexadecimal representation of the letter Ü). You can avoid this behavior by [setting a specific, unique barcode value](#) for that user without any accented letters (see page 5-88).

Label Format

The format of user labels is either Adobe Acrobat (PDF) or Physical Content Manager’s own report format (PLB), depending on the Report Label Format setting on the [Configure Physical Content Management page](#) (see page 5-2). The PCM report format is an XML-based, plain-text data file with file extension PLB (for labels) or PRT (for reports) that can be viewed and printed using the [Print Report Utility](#), which can be installed from the PCM distribution media and also from `[CS_Instance_Dir]/custom/PhysicalContentManager/Client`. For further details on this utility, refer to [Appendix A \(Using the Print Report Utility\)](#).

PDF Labels

The layout and contents of user labels in the PDF format are controlled by the `print_user_barcode_label.htm` template in `[CS_Instance_Dir]/custom/PhysicalContentManager/templates/`. This is a plain-text HTML file with Idoc Script, which you can use to customize the label (much like regular Content Server pages).



Note: For more information on customizations using Idoc Script, refer to the Content Server developer documentation and to the readme file provided with the ReportMaker component. You can find this file at `[CS_Instance_Dir]/custom/ReportMaker/readme.htm`. If required, you may also want to seek the assistance of Oracle’s support services.

PLB Labels

The layout and contents of user labels (in PLB data files) can be modified using the Crystal Report Writer application. See [Appendix A \(Using the Print Report Utility\)](#) for further details.

Print User Labels Page



Note: You must have the PCM.Admin.PrintLabel [right](#) to access the Print User Labels page. By default, this right is assigned to the predefined ‘pcadmin’ role.

Use the Print User Labels page to print barcode labels for a specific user or all users. To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) (page 5-2) is displayed.


4. Click **Reports—Print User Labels** on the top menu bar.

Figure 9-2 Print User Labels page

The screenshot shows a web interface titled "Print User Labels". It features a "User to Print" label followed by a text input field and a dropdown menu. Below this is a checkbox labeled "Print All Users". At the bottom, there are three buttons: "Print Label(s)", "Reset", and "Quick Help".

Page Features

The table below describes the various features of the Print User Labels page.

Feature	Description
User To Print	<p>Specify the user for whom a barcode label should be printed. You can manually enter a user name or select one from the dropdown list.</p> <p>If the specified user exists in the content server, his or her login name and full name are included in the label; otherwise, the label will include what you specified in this field.</p> <p> Tech Tip: If you manually enter a user name, any lower-case letters are automatically converted to upper case on the label. Also, if the user name contains any accented letters (for example, 'kmüller'), then these letters are represented as hexadecimal values on the label (for example, 'KMC39CLLER', where C39C is the hexadecimal representation of the letter Ü).</p>
Print All Users	<p>Select this check box if you want user labels to be printed for all defined users in the content server. This check box takes precedence over the User To Print field—that is, if you specify a user in that field and you select the check box, a PDF file is generated with barcode labels for <i>all</i> users and not the one you specified.</p>
Print Label(s) button	<p>Click this button to generate the file with the user label(s) in the configured format.</p>
Reset button	<p>Click this button to restore the page to its default settings (i.e., empty User To Print field and cleared Print All Users check box).</p>

Creating User Labels

Use this procedure to create barcode labels for a specific user or all users.



Note: You must have the `PCM.Admin.PrintLabel` right to print user labels. By default, this right is assigned to the predefined 'pcmadmin' role.

To print user labels, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) (page 5-2) is displayed.

4. Click **Reports—Print User Labels** on the top menu bar.

The [Print User Labels Page](#) (page 9-5) is displayed.

5. In the **User to Print** field, specify the name of the user for whom you want to print a user label, or select the **Print All Users** check box to print user labels for all users in the system.
6. Click **Print Label(s)** to create the label file.

A label file called "ResultSetReport.pdf" or "ResultSetReport.plb" is created (depending on the configured file format), and a dialog is displayed in which you can open or save the generated file.



Tech Tip: If you have the [Print Report Utility](#) installed on your computer, you can open the generated PLB file directly in this application by choosing the "Open with" option and selecting the Print Report Utility executable from the dropdown list.



Note: If the generated label file is in the PDF format, you need at least version 6.0 of the Acrobat software to view it. It cannot be accessed using Adobe Acrobat 5.x or earlier.

STORAGE LOCATION LABELS

This section covers the following topics:

- ❖ [About Storage Location Labels](#) (page 9-8)
- ❖ [Creating Storage Location Labels](#) (page 9-10)

About Storage Location Labels

A storage location label contains barcodes and other information for the current storage location and, if desired, all its child storage locations (if any). Only storage locations that can hold content items are included (in other words, locations that have barcodes). This means that any “intermediate” storage levels are skipped if they are not set up to hold content.

Figure 9-3 Sample storage location label



By default, the label for a storage location provides the following information:

- ❖ a barcode representing the barcode value that was specified when the storage location was [created](#), or, if none was specified, a random, 19-digit number,
- ❖ the barcode value or random number as readable text immediately below the barcode (as preceded by the letter ‘S’),
- ❖ the storage location’s name,
- ❖ the storage location’s description, and
- ❖ the storage location’s location type.



Tech Tip: Any lower-case letters in the barcode value of a storage location are automatically converted to upper case. Also, if a barcode value contains any accented letters (for example, 'MÜNCHEN'), then these letters are represented as hexadecimal values (for example, 'MC39CNCHEN', where C39C is the hexadecimal representation of the letter Ü). If you want to avoid this behavior, make sure that you do not use accented letters or any other characters than a-z, A-Z, and 0-9 in the barcode values of storage locations.

Label Format

The format of storage location labels is either Adobe Acrobat (PDF) or Physical Content Manager's own report format (PLB), depending on the Report Label Format setting on the [Configure Physical Content Manager page](#) (see page 5-2). The PCM report format is an XML-based, plain-text data file with file extension PLB (for labels) or PRT (for reports) that can be viewed and printed using the [Print Report Utility](#), which can be installed from the PCM distribution media and also from `[CS_Instance_Dir]/custom/PhysicalContentManager/Client`. For further details on this utility, refer to [Appendix A \(Using the Print Report Utility\)](#).

PDF Labels

The layout and contents of storage location labels in the PDF format are controlled by the `print_storage_barcode_label.htm` template in `[CS_Instance_Dir]/custom/PhysicalContentManager/templates/`. This is a plain-text HTML file with Idoc Script, which you can use to customize the label (much like regular Content Server pages).



Note: For more information on customizations using Idoc Script, refer to the Content Server developer documentation and to the readme file provided with the ReportMaker component. You can find this file at `[CS_Instance_Dir]/custom/ReportMaker/readme.htm`. If required, you may also want to seek the assistance of Oracle's support services.

PLB Labels

The layout and contents of storage location labels (in PLB data files) can be modified using the Crystal Report Writer application. See [Appendix A \(Using the Print Report Utility\)](#) for further details.

Creating Storage Location Labels

Use this procedure to create a label for a storage location. The label file contains the barcodes and other information for the current storage location and all its child storage locations (if desired). Only storage locations that can hold content items are included (in other words, locations that have barcodes). This means that any “intermediate” storage levels are skipped if they are not set up to hold content.

The format of the label file depends on the Report Label Format setting on the [Configure Physical Content Manager](#) page (see page 5-2).



Note: You must have the PCM.Admin.PrintLabel [right](#) to create storage location labels. By default, this right is assigned to the predefined ‘pcmadmin’ role.



To create a label for a storage location, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.
4. Navigate to the storage space level—i.e., the [Exploring “\[Location\]”](#) page (see page 6-12)—for which you want to print a label.
5. Depending on the current storage location, select any of the following options in the action icon dropdown menu for the storage location that you want to print a label for:
 - **Labels—Print Labels for Children**—This option is displayed if the current storage location cannot hold items. Choose this option to create labels for all its child locations that can hold items.
 - **Labels—Print Label**—This option is displayed if the current storage location can hold items and does not have any child locations. Choose this option to create a label for the current storage location.
 - **Labels—Print Label Including Children**—This option is displayed if the current storage location can hold items and has child locations. Choose this option to create labels for the current storage location as well as all its child locations.

A label file called “ResultSetReport.pdf” or “ResultSetReport.plb” is created (depending on the configured file format), and a dialog is displayed in which you can open or save the generated file.



Tech Tip: If you have the [Print Report Utility](#) installed on your computer, you can open the generated PLB file directly in this application by choosing the “Open with” option and selecting the Print Report Utility executable from the dropdown list.

-  **Note:** If the generated label file is in the PDF format, you need at least version 6.0 of the Acrobat software to view it. It cannot be accessed using Adobe Acrobat 5.x or earlier.
-  **Note:** You can also create a label for a storage location from the Actions dropdown menu on its [information page](#) (see page 6-30). This menu will contain an option to print a label only if the storage location can hold content.

PHYSICAL ITEM LABELS

This section covers the following topics:

- ❖ [About Physical Item Labels](#) (page 9-11)
- ❖ [Creating Physical Item Labels](#) (page 9-13)

About Physical Item Labels


A physical item label contains a barcode of an individual physical item, along with some other information for that item.

Figure 9-4 Sample physical item label



By default, the label for a physical item provides the following information:

- ❖ a barcode representing the item's name
- ❖ the item's name as readable text immediately below the barcode (in all upper-case letters, preceded by the letter 'O'),
- ❖ the item's name (see note below), and
- ❖ the item's title.

-  **Note:** If the content server is using Oracle or DB2 as the database, the item's name is displayed in all upper-case letters.



Tech Tip: Any lower-case letters in the name of a physical item are automatically converted to upper case. Also, if a name contains any accented letters (for example, 'ÜBERPRÜFUNG'), then these letters are represented as hexadecimal values (for example, 'C39CBERPRC39CFUNG', where C39C is the hexadecimal representation of the letter Ü). If you want to avoid this behavior, make sure that you do not use accented letters or any other characters than a-z, A-Z, and 0-9 in the names of physical items.

Label Format

The format of physical item labels is either Adobe Acrobat (PDF) or Physical Content Manager's own report format (PLB), depending on the Report Label Format setting on the [Configure Physical Content Manager page](#) (see page 5-2). The PCM report format is an XML-based, plain-text data file with file extension PLB (for labels) or PRT (for reports) that can be viewed and printed using the [Print Report Utility](#), which can be installed from the PCM distribution media and also from `[CS_Instance_Dir]/custom/PhysicalContentManager/Client`. For further details on this utility, refer to [Appendix A \(Using the Print Report Utility\)](#).

PDF Labels

The layout and contents of physical item labels in the PDF format are controlled by the `print_external_item_barcode_label.htm` template in `[CS_Instance_Dir]/custom/PhysicalContentManager/templates/`. This is a plain-text HTML file with Idoc Script, which you can use to customize the label (much like regular Content Server pages).



Note: For more information on customizations using Idoc Script, refer to the Content Server developer documentation and to the readme file provided with the ReportMaker component. You can find this file at `[CS_Instance_Dir]/custom/ReportMaker/readme.htm`. If required, you may also want to seek the assistance of Oracle's support services.

PLB Labels

The layout and contents of physical item labels (in PLB data files) can be modified using the Crystal Report Writer application. See [Appendix A \(Using the Print Report Utility\)](#) for further details.


Creating Physical Item Labels

Use this procedure to create a label for a physical item.



Note: You must have the `PCM.Admin.PrintLabel` right to create physical item labels. By default, this right is assigned to the predefined 'pcmadmin' role.

To create a label for a physical item, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item for which you want to print a label. For further details, refer to [Chapter 13 \(Searching for Physical Content\)](#).
3. Click the item's action popup menu () and choose the **Print Label**.

A label file called "ResultSetReport.pdf" or "ResultSetReport.plb" is created (depending on the configured file format), and a dialog is displayed in which you can open or save the generated file.



Note: You can also print labels for multiple items on the search results page by selecting each of them and then choosing **Labels—Print External Barcode Labels** in the menu bar at the top of the page.



Tech Tip: If you have the [Print Report Utility](#) installed on your computer, you can open the generated PLB file directly in this application by choosing the "Open with" option and selecting the Print Report Utility executable from the dropdown list.



Note: If the generated label file is in the PDF format, you need at least version 6.0 of the Acrobat software to view it. It cannot be accessed using Adobe Acrobat 5.x or earlier.

Chapter
10

WORKING WITH RESERVATIONS

OVERVIEW

This section covers the following topics:

Concepts

- ❖ [About Reservations](#) (page 10-2)
- ❖ [Reservation Process](#) (page 10-3)
- ❖ [Reservation Workflow](#) (page 10-5)
- ❖ [Reservations History](#) (page 10-6)
- ❖ [Reservation Request Properties](#) (page 10-6)
- ❖ [Request Item Actions](#) (page 10-9)

Interface

- ❖ [Workflow Review for Request Page](#) (page 10-11)
- ❖ [Create/Edit Request Page](#) (page 10-13)
- ❖ [Search Reservations Page](#) (page 10-18)
- ❖ [Reservation Search Results Page](#) (page 10-21)
- ❖ [Request Information Page](#) (page 10-25)
- ❖ [Items for Request Page](#) (page 10-26)
- ❖ [Request Item Information Page](#) (page 10-28)

- ❖ [Edit Request Item Page](#) (page 10-30)
- ❖ [Request Report Pages](#) (page 10-32)

Tasks

- ❖ [Creating a Reservation Request](#) (page 10-33)
- ❖ [Editing a Reservation Request](#) (page 10-34)
- ❖ [Deleting a Reservation Request](#) (page 10-35)
- ❖ [Searching For Reservations](#) (page 10-36)
- ❖ [Saving Reservation Search Results](#) (page 10-37)
- ❖ [Viewing Reservations for a Physical Item](#) (page 10-38)
- ❖ [Viewing Your Own Reservation Requests](#) (page 10-38)
- ❖ [Editing a Request Item](#) (page 10-39)
- ❖ [Cancelling a Request Item](#) (page 10-39)
- ❖ [Deleting a Request Item](#) (page 10-40)
- ❖ [Changing the Status of a Request Item](#) (page 10-41)

ABOUT RESERVATIONS

Physical Content Manager offers circulation services for physical content items, in much the same way as a library. Users can receive items, keep them for a specific period of time, and then return them, so they can be stored at their designated location again for someone else to check out.

Users can put a hold on items that are currently unavailable (for example, because someone else already has the item in their possession). If more than one person made a reservation request for an item, there is a waiting list, which specifies the order in which people made a reservation for the item.

A reservation request may comprise multiple items.

After a user makes a reservation request, an e-mail notification is sent to the system administrator, who processes the request and starts the reservation fulfillment process in accordance with the applicable procedures in your organization.



Tech Tip: You can use the [Print Report Utility](#) (see Appendix A) to print a “pick list” report which lists all reserved items that need to be taken from storage for further processing and reservation fulfillment.



Tech Tip: By default, each user can place only one reservation request for the same item. If there are users that make reservation requests on behalf of multiple people (for example, manager assistants), it may be useful to override this behavior. To accomplish this, add the following variable to the `[CS_Instance]/custom/PhysicalContentManager/physicalcontentmanager_environment.cfg` configuration file:

```
AllowMultipleRequests=true
```

RESERVATION PROCESS

The typical fulfillment process of a reservation request is as follows:



Note: Your specific reservation process may differ from the one described here, depending on the procedures in place in your organization.

1. A user [creates](#) a reservation request for one or more items (see page 10-33).

As soon as the user submits the reservation request, the [status](#) (see page 10-7) of each requested item is automatically set to “In Process,” or, if it was already “In Process” or “Checked Out,” it is set to “Waiting List.” In other words, each item is marked for processing, or, if it is already being processed for a different reservation or is already checked out to someone, it is added to the waiting list for the item.

2. A [reservation workflow](#) is initiated (see page 10-5), and the system administrator receives an e-mail notification to review the reservation request.



Tech Tip: It is possible to [override](#) this behavior (see page 10-5).

3. The system administrator [approves](#) (or rather, acknowledges) the reservation request (see page 10-11).
4. If any items in the reservation request are not available or should be denied for some reason, the system administrator can [change](#) their [status](#) accordingly (see page 10-41).
5. All available requested items (not already checked out) are gathered from their storage location, in accordance with your organization’s procedures (for example, using the [pending request report](#); see page 10-32).

6. The [status](#) (see page 10-7) of each available requested item should be changed to “Checked Out.” If you use a [barcode scanner](#) (see chapter 8) to scan each item for check-out, this is done automatically after you [upload](#) the barcode file to the Physical Content Manager application.

As soon as the status of the item changes to “Checked Out,” its current location (as shown on the [Physical Item Information page](#); see page 12-11) is automatically set to the deliver-to location that was specified when the reservation request was [created](#). If no deliver-to location was specified, the current location is set to “OTHER.” Also, the current location comment on the [Physical Item Information page](#); see page 12-11) is set to the location comment specified for the associated reservation request. If no comment was provided, it is set to the login name of the user who made the reservation.

7. The requesting user can be notified and the reservation fulfilled in accordance with the applicable procedures within the organization. (This is handled outside of Physical Content Manager.)

The user can keep the checked-out items for a specific [number of days](#) (see page 5-5).

8. After the item is returned, it can be stored back in its assigned location. Its [status](#) (see page 10-7) should be changed to “Returned” and its current location set to its assigned storage location. If you use a [barcode scanner](#) (see chapter 8) to scan the item for check-in, this is done automatically after you [upload](#) the barcode file to the Physical Content Manager application.

If there is a waiting list for the item, the status for the next requestor on the list should be changed from “Waiting List” to “In Process,” so the item can be processed for that user. This can be done manually on any of the reservation pages, but if you use a [barcode scanner](#) (see chapter 8) to scan the item for check-in, it may also be done automatically, depending on how Physical Content Manager is [configured](#) (see page 5-7).



Note: The status of the item continues to be “Returned” until the reservation is deleted. This can be done [manually](#) (see page 10-35) or [automatically](#) (after a certain number of days; see page 5-5).

RESERVATION WORKFLOW

Reservations in Physical Content Manager are handled using a special criteria workflow called “ReservationProcess,” which is used for approval and notification purposes.



Tech Tip: The reservation workflow is not used if the “Check in internal content item for reservation workflow” setting on the [Configure Physical Content Manager page](#) (see page 5-2) is disabled. In that case, users can still make reservations, but no-one will receive any e-mail notifications about them (not even the system administrator). This means that a different procedure to process reservations should be in place.

Users with the predefined ‘pcmrequestor’ role can make reservations for physical items. If you have the predefined ‘pcmadmin’ role, you can also edit and process reservation request.

By default, if a user [submits a reservation request](#) for one or more items (see page 10-33), a new content item is checked into the content server (in the Reservation security group). This content item automatically enters the ReservationProcess workflow, and the system administrator receives a workflow review notification about the request.

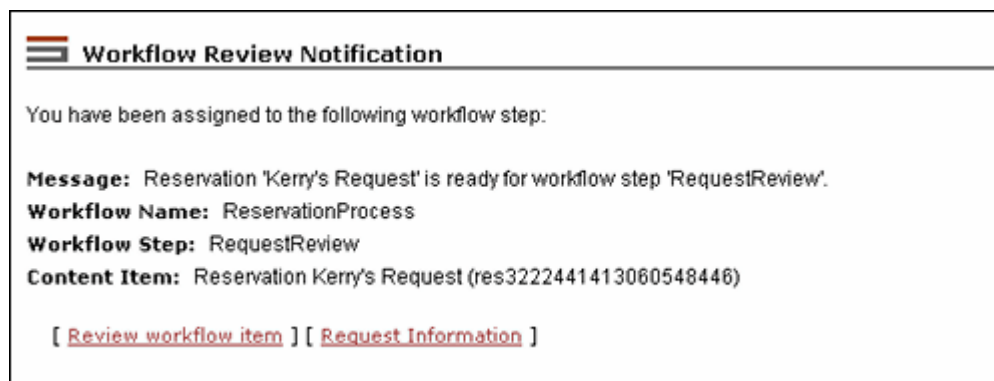


Note: You can [configure the default metadata values](#) that are assigned to the reservation workflow item that is checked into the content server (see page 5-76).



Tech Tip: By default, the ‘sysadmin’ role in Content Server receives e-mail notifications about pending reservations, and the requesting user is not notified. You can change this behavior by changing the ReservationGroup alias in Content Server’s User Admin utility. For example, you could set up the workflow to also send e-mail notifications to the user who made the reservation request.

Figure 10-1 Workflow review notification for reservation request



Clicking the ‘Review workflow item’ link in the notification e-mail opens the [Workflow Review for Request page](#) (see page 10-11), where the system administrator can approve (or rather, acknowledge) the reservation request. As soon as the system administrator clicks the Approve button on the [Workflow Review for Request page](#), the reservation request exits the workflow.

The system administrator can then proceed and fulfill the reservation request in accordance with the applicable procedures within the organization.



Tech Tip: The reservation process can be modified to suit your organization’s need by changing the ReservationProcess workflow. For more information on workflows, refer to the Content Server administration and workflow documentation. If required, you may seek the assistance of Oracle’s Consulting Services group.

RESERVATIONS HISTORY

All completed reservation requests are automatically logged in the reservations history. A reservation request is considered completed if none of its request items are still pending (in process), on a waiting list, or checked out—in other words, they are returned, denied, not found, unavailable, or cancelled.



Tech Tip: By default, completed reservation requests are stored in the history log indefinitely. However, you can limit the maximum number of days that a completed request is included in the history by modifying settings on the [Configure Physical Content Manager page](#); see page 5-2).

A system administrator can view the current reservations history by [searching for reservations](#) with the Completed field set to ‘Yes’ (see page 10-18).

RESERVATION REQUEST PROPERTIES

Each reservation request has a number of properties, including:

- ❖ [Request Status](#) (page 10-7)
- ❖ [Transfer Method](#) (page 10-8)
- ❖ [Priority](#) (page 10-8)

Request Status

The request status specifies the current status for a reserved physical item, which can be any of the following:

- ❖ **Waiting List**—This means that the request item is currently already checked out to someone else. It will become available to the next requestor upon its return (unless the system administrator chooses to override the waiting list order).
- ❖ **In Process** (initial default)—This means that the reserved item is available and is being prepared for delivery. Only one request item for a reservation can have the “In Process” status.
- ❖ **Not Found**—This means that the request item could not be located in its designated location.
- ❖ **Unavailable**—This means that the request item cannot currently be processed for delivery.
- ❖ **Denied**—This means that the reservation request has been rejected by the administrator and cannot be fulfilled.
- ❖ **Cancelled**—This means that the reservation request was called off before it could be fulfilled.
- ❖ **Checked Out**—This means that the reserved item is currently in the possession of someone as part of a reservation request. If a physical item is checked out, its current location (as shown on the [Physical Item Information page](#); see page 12-11) is automatically set to the value of the [Deliver To Location field](#) for the associated reservation request. If no value was entered in this field, the current location is set to “OTHER.” Also, the current location comment on the [Physical Item Information page](#) is set to the location comment specified for the associated reservation request. If no comment was provided, it is set to the login name of the user who made the reservation.
- ❖ **Overdue**—This means that the reserved item is currently checked out to someone who has failed to return the item within the [configured checkout time](#) (see page 5-2). As a result, the reservation request cannot currently be fulfilled.



Note: By default, an e-mail notification is sent out to the user who has an overdue item. If you want, you can [turn off this e-mail notification](#) (see page 5-2).

- ❖ **Returned**—This means that the checked-out item was returned to the storage repository, so that it is available for other users to reserve and check out.

A reservation request is considered completed if none of its request items are still pending (in process), on a waiting list, or checked out (including overdue)—in other words, they are returned, denied, not found, unavailable, or cancelled.



Note: You must have the `PCM.Reservation.Process` right to [change the status](#) of a reservation request item. By default, this right is assigned to the predefined ‘pcmadmin’ role.

Transfer Method

The transfer method specifies how the person who made the request (the requestor) will receive the reserved item. They specify the desired transfer method when they [create](#) a reservation request (see page 10-33). The following transfer methods are supported:

- ❖ **Copy**—This means that the physical content item will be duplicated, and the copy will be provided to the intended recipient. The copy can be physical (for example, a document run through a copier or a copied DVD) or electronic (for example, a scanned document or an ISO image of a CD).
- ❖ **Fax**—This means that the physical content item will be faxed to its intended recipient.
- ❖ **Mail**—This means that the original physical content item will be mailed to its intended recipient.
- ❖ **Pickup**—This means that the intended recipient will pick up the physical content item in person.
- ❖ **Email**—This means that the content item will be e-mailed to its intended recipient.



Note: The default transfer method is set on the [Configure Physical Content Manager page](#) (see page 5-2).

Priority

The priority of a reservation request specifies the urgency with which it needs to be fulfilled. Users specify the desired priority when they [create](#) a reservation request (see page 10-33). The following priorities are supported:

- ❖ **No Priority**—This means that delivery of the requested item does not have any particular priority (i.e., there is no rush). The item can be delivered in accordance with the applicable fulfillment procedures.
- ❖ **ASAP Rush**—This means that the requested item should be delivered to its intended recipient as soon as possible after the reservation was made.

- ❖ **This Morning**—This means that the requested item should be delivered to its intended recipient the same morning that the reservation was made.
- ❖ **Today**—This means that the requested item should be delivered to its intended recipient the same day that the reservation was made.
- ❖ **This Week**—This means that the requested item should be delivered to its intended recipient the same week that the reservation was made.



Note: The default priority is set on the [Configure Physical Content Manager page](#) (see page 5-2).

REQUEST ITEM ACTIONS

If you are an administrator, you can perform a number of actions on a request item to change its status as part of the reservation fulfillment process. These actions are accessible through the actions popup menu (☰) for a request item on the [Reservations Search Results page](#) (see page 10-21) or the [Items for Request page](#) (see page 10-26). You can also perform the actions on multiple items simultaneously using the Actions dropdown menu on the [Items for Request page](#).

The following actions are supported:



Note: Not all actions may be available for a particular request item, depending on the item's current [status](#). For example, if the item is currently checked out, you can only delete or return it.

- ❖ **Delete**

This option enables you to [delete](#) an item (see page 10-40) from a reservation request. If you delete an item, the request for that item is not included in the reservation log (in other words, the item is no longer in the item list for the reservation request).

This option is available only if the system has been [set up](#) to allow users to delete items from a reservation request (see page 5-2). In addition, you can delete requested items only if you have the PCM.Reservation.Delete right (assigned to the predefined 'pcadmin' role by default).

- ❖ **Deny**

This option enables you to reject the reservation request for an item. The item will remain to be part of the reservation request, but it will not be provided to the requestor.

- ❖ **Not Found**

This option enables you to change the status of an item because it could not be located

in its designated location. The item will remain to be part of the reservation request, but it cannot currently be provided to the requestor.

❖ **Unavailable**

This option enables you to change the status of an item because it cannot currently be processed for delivery. The item will remain to be part of the reservation request, but it cannot currently be provided to the requestor.

❖ **Cancel**

This option enables you to [call off](#) the reservation request for an item before it is fulfilled (see page 10-39). If you cancel a request item, the request for that item is still included in the reservation log (in other words, the item is still on the item list for the reservation, with its status set to “Cancelled”).

You can cancel request items only if you have the `PCM.Reservation.Edit` right (assigned to the predefined ‘pcmadmin’ role by default). Also, you can only cancel a request item if it has the “In Process” status.

❖ **Check Out**

This option enables you to change the status of an item because it was handed off to its intended recipient, who can now keep the item for the [configured checkout period](#). After you check out a request item, its current location (as shown on the [Physical Item Information page](#); see page 12-11) is automatically set to the value of the [Deliver To Location field](#) for the associated reservation request. If no value was entered in this field, the current location is set to “OTHER.” Also, the current location comment on the [Physical Item Information page](#)) is set to the location comment specified for the associated reservation request. If no comment was provided, it is set to the login name of the user who made the reservation.

❖ **Returned**

This option enables you to change the status of a checked-out item because it was returned handed off to its intended recipient, who can now keep the item for an agreed period of time.

WORKFLOW REVIEW FOR REQUEST PAGE

Use the Workflow Review for Request page to see what items are included in a reservation request, and to approve or reject the request. To access this page, click on the **Review workflow item** link in the workflow review notification e-mail that you received.

Figure 10-1 Workflow Review for Request page

The screenshot shows a web interface titled "Workflow Review for Request 'Kerry's Request'". Below the title is a "Reservation" section. On the right, there is an "Actions:" dropdown menu with "Select an action" selected. Below this is a table with columns: "Select All", "External Item", "Barcode", "Status", "Transfer Method", and "Actions". The "Select All" column has a checkbox. The "External Item" column contains "Test For Barcode D6". The "Barcode" column contains "D6". The "Status" column contains "In Process". The "Transfer Method" column contains "Pickup". The "Actions" column contains a dropdown menu with a right-pointing arrow and an information icon. Below the table is an "Approve" button.



This page shows the items that are included in the reservation request, including their name, barcode, current **status** (see page 10-7), and selected **transfer method** (see page 10-8). You acknowledge the reservation request by clicking the **Approve** button; the reservation workflow is then completed for the reservation. After clicking the **Approve** button, you can start processing the item(s) in the reservation request. You can change the **status** of the requested item(s) using the Actions dropdown menu or the action icon popup menu (▶). For example, you can deny the request item, or mark it as unavailable or checked out.

The requesting user can now be notified and the reservation fulfilled in accordance with the applicable procedures within your organization.

Page Features

The table below describes the various features of the Workflow Review for Request page.

Feature	Description
Selection check boxes	Select the check box for each item that you want to perform the action in the main Actions dropdown menu on. You can select the check box in the column heading to select all items on the page.
External Item	This is the name of the individual physical item in a reservation request.

Feature	Description
Barcode	This is the barcode value of the individual item in a reservation request.
Status	This is the current status of the individual item in a reservation request (see page 10-7).
Transfer Method	This is the selected transfer method for the individual item in a reservation request (see page 10-8).
Actions menu icon ()	<p>If you click on this icon for a search result item, a popup menu is displayed with a number of options relevant to that particular item. The menu options include:</p> <ul style="list-style-type: none"> ❖ Request Item Information—Choose this option to display the information page for the individual request item (see page 10-28). <p>In addition, the popup menu for individual request items includes a number of actions that enable you to change the status of the item (see page 10-9).</p>
Info icon ()	If you click on this icon, the Request Item Information page (page 10-28) is displayed.

Menu Bar

Depending on your assigned rights, there may be a menu bar at the top of the page. This menu offers a number of options that apply to all items on the page. You can change the view of the page (thumbnail view of headline view). In addition, the menu contains a number of [actions](#) that enable you to change the current request [status](#) of the selected item(s) (see page 10-7).

CREATE/EDIT REQUEST PAGE

Create Request Page



Note: You must have the PCM.Reservation.Create [right](#) to access the Create Request page. By default, this right is assigned to the predefined 'pcmrequestor' and 'pcmadmin' roles.

Use the Create Request page to create a new reservation request. To access this page, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item(s) that you want to reserve, and add them to your [content basket](#).



Note: For more information on searching for physical content, refer to chapter 13. For more information on the content basket, refer to chapter 15.

3. Choose **My Content Server—My Content Basket** to open your content basket.
The [Content Basket page](#) (see page 15-8) is displayed.
4. Select the check box of each physical item that you want to reserve, and choose **Request Selected Items** from the **Request** menu at the top of the page. If you want to reserve all items in your content basket, you can also choose **Request All Items**.
A prompt is displayed asking you whether the selected items should be removed from the content basket after they are reserved.
5. Click **Yes** or **No** according to your preference. If you click **Cancel**, the reservation request is cancelled.

Figure 10-2 Create Request page

Create Request

Request Name

Request Date

* Requestor

* Security Group

Transfer Method

Priority

Required By Date

Deliver To Location

Location Comment

Comments

Edit Request Page



Note: You must have the `PCM.Reservation.Edit` right to access the Edit Request page. By default, this right is assigned to the predefined 'pcmrequestor' and 'pcmadmin' roles.


Use the Edit Request page to modify the properties of an existing reservation request. To access this page, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**
The [basic search page](#) is displayed (see page 13-2).
4. Click **Search—Reservations**.
The [Search Reservations Page](#) (page 10-18) is displayed.
5. Specify the criteria by which to search, and click **Search**.



Note: If you want to see your own requested items, you can also open the **My Content Server** tray or top menu and choose **My Reservations**.

The [Reservation Search Results Page](#) (page 10-21) is displayed, which lists all reservations requests that meet your search criteria.


6. Locate the reservation request that you want to edit, and choose **Request Information** from its actions popup menu (.

The [Request Information Page](#) (page 10-25) is displayed.

7. Choose **Edit** in the menu bar.

Page Features

The table below describes the various features of the Create Request and Edit Request pages.

Feature	Description
Request Name	<p>Specify a name for the reservation request. This name does not have to be unique (in other words, you can create multiple reservation requests with the same name).</p> <ul style="list-style-type: none"> ❖ Required ❖ Maximum number of characters: 30. <p> Tech Tip: Each reservation request has a system-internal reference that is unique. The PCM application keeps track of each reservation request using this internal reference, not the request name.</p>
Request Date	<p>This is the date and time that the reservation request was made. The default is the current date and time.</p> <p>This field is view-only on the Edit Request page.</p> <ul style="list-style-type: none"> ❖ Required

Feature	Description
Requestor	<p>Specify the person who submitted the reservation request. The default is the user that is currently logged in. You can select a different user from the dropdown list, or manually enter a user.</p> <p>This field is view-only on the Edit Request page.</p> <p>❖ Required</p>
Security Group	<p>Select the security group that the reservation request should be assigned to. Security groups are sets of files with the same access permissions. You can use security groups to limit the reservation requests that users have access to.</p> <p>❖ Required.</p>
Transfer Method	<p>Select the desired transfer method for the reservation request (see page 10-8).</p> <p>❖ Required</p>
Priority	<p>Select the desired priority for the reservation request (see page 10-8).</p> <p>❖ Required</p>
Required By Date	<p>Specify the date that the reserved item(s) should be available. You can click the calendar icon to select a date from a popup dialog.</p> <p>Providing a time along with a date is optional. If you do not specify a time, 12:00 PM (midnight) is assumed.</p>

Feature	Description
Deliver To Location	<p>Specify the location that the reserved item(s) should be delivered to. If this location is somewhere in the storage space environment, you can use the Browse button to select the location (see page 12-10). Otherwise, specify 'Other' or leave this field empty. You can then use the Location Comment field to provide delivery details.</p> <p>If an item is checked out, its current location (as shown on the Physical Item Information page; see page 12-11) is automatically set to the value of this field for the associated reservation request. If no value was entered, the current location is set to "OTHER."</p>
Location Comment	<p>If required, specify details about the delivery location (for example, "Building A, Room 315").</p> <p>If an item is checked out, the value of this field is shown in the Current Location Comment field on the Physical Item Information page; see page 12-11). If you do not specify a location comment here, the Current Location Comment field will show the login name of the user who made the reservation.</p>
Comments	<p>If required, specify additional comments about the reservation request (for example, delivery or handling instructions).</p>
Create button (Create page only)	<p>Click this button to create the reservation request.</p>
Submit Update button (Edit page only)	<p>Click this button to submit the updated reservation request.</p>
Reset button	<p>If you are creating a new reservation request, clicking this button resets the page to its initial default settings. If you are editing an existing reservation request, this returns the original request settings before you made any modifications.</p>

Feature	Description
Quick Help button	Click this button to display context-specific help information about this page.

As soon as a reservation request is submitted, the [status](#) of all request items is automatically changed to “In Process,” unless their status is already “In Process” or “Checked Out.” In that case, it is changed to “Waiting List.”



Note: Users with the standard reservation privileges (i.e., with the predefined ‘pcmrequestor’ role) cannot make any changes to an existing reservation by default. If you want to enable them to edit existing reservation requests, you need to give them the `PCM.Reservation.Edit` [right](#).



Tech Tip: By default, each user can place only one reservation request for the same item. If there are users that make reservation requests on behalf of multiple people (for example, manager assistants), it may be useful to override this behavior. To accomplish this, add the following variable to the `[CS_Instance]/custom/PhysicalContentManager/physicalcontentmanager_environment.cfg` configuration file:

```
AllowMultipleRequests=true
```

SEARCH RESERVATIONS PAGE

Use the Search Reservations page to find existing reservations that meet your search criteria.



Note: You must have the `PCM.Reservation.Read` [right](#) to access the Search Reservations page. By default, this right is assigned to the predefined ‘pcmrequestor’ and ‘pcmadmin’ roles.

To access this page, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**
The [basic search page](#) is displayed (see page 13-2).
4. **Search—Reservations.**

Figure 10-3 Search Reservations page

Display individual Request Items

Request Name	Substring <input type="text"/>		
Request Date	From <input type="text"/> <input type="button" value="Calendar"/>	To	<input type="text"/> <input type="button" value="Calendar"/>
Requestor	Substring <input type="text"/>		
Security Group	Substring <input type="text"/>		<input type="text"/>
Completed	Substring <input type="text"/>		<input type="text"/>
Transfer Method	Substring <input type="text"/>		<input type="text"/>
Priority	Substring <input type="text"/>		<input type="text"/>
Required By Date	From <input type="text"/> <input type="button" value="Calendar"/>	To	<input type="text"/> <input type="button" value="Calendar"/>
Deliver To Location	Substring <input type="text"/>	<input type="button" value="Browse..."/>	
Location Comment	Substring <input type="text"/>		
Request Comments	Substring <input type="text"/>		
External Item	Substring <input type="text"/>		
Status	Substring <input type="text"/>		<input type="text"/>
Checkout Date	From <input type="text"/> <input type="button" value="Calendar"/>	To	<input type="text"/> <input type="button" value="Calendar"/>
Item Comments	Substring <input type="text"/>		
Transfer Date	From <input type="text"/> <input type="button" value="Calendar"/>	To	<input type="text"/> <input type="button" value="Calendar"/>
Returned Date	From <input type="text"/> <input type="button" value="Calendar"/>	To	<input type="text"/> <input type="button" value="Calendar"/>

Results Options

Results Per Page: Sort By:

Page Features

The table below describes the various features of the Search Reservations page.

Feature	Description
Criteria Definition	
Display Individual Request Items	If you select this check box, the search results (page 10-21) will display all individual request items within the reservations that meet your search criteria. If you clear it, only the reservations are displayed (and not the items in them).
Search criteria fields	<p>Use these fields to specify the search criteria by which to search the existing reservations.</p> <p>If the search field contains a date, you can use the calendar icon to the right of the field to pick a date from a calendar popup.</p> <p>For more general information about searching, refer to the <i>Records Manager User Guide</i> and <i>Content Server User Guide</i>.</p> <p>Please note the following</p> <ul style="list-style-type: none"> ❖ A reservation request is considered completed if none of its request items are still pending (in process), on a waiting list, or checked out—in other words, they are returned, denied, not found, unavailable, or cancelled.
Results Options	
Results Per Page	<p>Specify the maximum number of reservations displayed on each search results page.</p> <ul style="list-style-type: none"> ❖ Default: 20.
Sort By	<p>Select an attribute by which to sort the results.</p> <p>The list contains all of the search criteria options for reservations.</p>

Feature	Description
Sort order list	Specify the sort order of the search results: <ul style="list-style-type: none"> ❖ Ascending (default)—Sorts alphabetical results in A-Z order; numerical results in 0-9 order; and date results in oldest to newest order. ❖ Descending—Sorts alphabetical results in Z-A order; numerical results in 9-0 order; and date results in newest to oldest order.
Search Commands	
Search button	Click this button to perform a search for reservations based on your specified criteria.
Clear button	Click this button to clear all criteria fields on the page and reset the page to its initial blank state.
Quick Help button	Click this button to display context-specific help information about this page.

RESERVATION SEARCH RESULTS PAGE

This page shows the results of a search query for reservations based on the criteria specified on the [Search Reservations page](#) (see page 10-18). It is displayed after you click the Search button on that page.

Figure 10-4 Reservation search results (without individual request items)

The screenshot shows a web interface titled "Reservation Search Results" with a subtitle "Found 1 potential item matching the query." Below the title is an "Actions:" dropdown menu set to "Select an action". A table displays the search results with the following columns: Request Name, Request Date, Requestor, Completed, and Actions.

Request Name	Request Date	Requestor	Completed	Actions
Contracts	3/17/06 8:44 AM	sysadmin	No	



Figure 10-5 Reservation search results (with individual request items)

Reservation Search Results Found 2 potential items matching the query.					
					Actions: <input type="text" value="Select an action"/>
Request Date	Requestor	External Item	Barcode	Status	Actions
3/17/06 8:44 AM	sysadmin	Contracts2005	CONTRACTS2005	In Process	
3/17/06 8:44 AM	sysadmin	Contracts2004	CONTRACTS2004	In Process	

Page Features (Without Individual Request Items)

The table below describes the various features of the Reservation Search Results page without the individual request items—that is, the “Display individual request items” check box on the [Search Reservations](#) page (see page 10-18) was not selected.



Feature	Description
Request Name	This is the identifier that references the reservation request, as specified when the reservation request was made (see page 10-13).
Request Date	This is the date and time that the reservation request was made.
Requestor	This is the person who submitted the reservation request.
Completed	This specifies whether the reservation request has been completed or not (“Yes” or “No”). A reservation request is considered completed if none of its request items are still pending (in process), on a waiting list, or checked out—in other words, they are returned, denied, not found, unavailable, or cancelled.

Feature	Description
Actions menu icon ()	<p>If you click on this icon for a search result item, a popup menu is displayed with the following options:</p> <ul style="list-style-type: none"> ❖ Request Information—Choose this option to display the information page for the reservation request (see page 10-25). ❖ Delete—Choose this option to delete the selected reservation request (see page 10-35). You can delete reservations only if you have the PCM.Reservation.Delete right (assigned to the predefined ‘pcadmin’ role by default).
Info icon ()	If you click on this icon, the Request Information page (page 10-25) is displayed.

Page Features (With Individual Request Items)

The table below describes the various features of the Reservation Search Results page with the individual request items—that is, the “Display individual request items” check box on the [Search Reservations page](#) (see page 10-18) was selected.

Feature	Description
Request Date	This is the date and time that the reservation request was made.
Requestor	This is the person who submitted the reservation request.
External Item	This is the name of an individual physical item that is currently included in a reservation request.
Barcode	This is the barcode value of an individual item that is currently included in a reservation request.
Status	This is the current status of an individual item that is currently included in a reservation request (see page 10-7).

Feature	Description
Actions menu icon ()	<p>If you click on this icon for a search result item, a popup menu is displayed with the following options:</p> <ul style="list-style-type: none"> ❖ Request Information—Choose this option to display the information page for the reservation request (see page 10-25). ❖ Request Item Information—Choose this option to display the information page for the individual request item (see page 10-28). ❖ Physical Item Information—Choose this option to display the information page for the physical item (see page 12-11). <p>In addition, the popup menu includes a number of actions that enable you to change the status of the item (see page 10-9) as part of the reservation fulfillment. The available actions depend on the current status of the request item.</p>
Info icon ()	<p>If you click on this icon, the information page for the physical item (see page 12-11) is displayed.</p>

Menu Bar

Depending on your assigned rights, there may be a menu bar at the top of the page. This menu offers a number of options that apply to all items on the page. The following options are available:

- ❖ **Thumbnail View**—Choose this option to display the page in thumbnail view.
- ❖ **Headline View**—Choose this option to display the page in headline view.
- ❖ **Save Search Results**—Choose this option to save the search results to a file. The file format depends on the Report Format setting on the Configure Records Management page. For further details, refer to the *Records Manager Setup Guide*.

REQUEST INFORMATION PAGE

Use the Request Information page to view the properties of an existing reservation request.



Note: You must have the PCM.Reservation.Read [right](#) to access the Request Information page. By default, this right is assigned to the predefined ‘pcmrequestor’ and ‘pcmadmin’ roles.

To access this page, complete the following steps:

1. Log into the content server.
2. [Search](#) for the reservation request whose properties you want to view (see page 10-18).



Note: If you want to see your own requested items, you can open the **My Content Server** tray or top menu and choose **My Reservations**.

The [Reservation Search Results Page](#) (page 10-21) is displayed, which lists all reservations requests that meet your search criteria.


3. Locate the reservation request whose properties you want to view, and choose **Request Information** from its actions popup menu ().

Figure 10-6 Request Information page

The screenshot shows a web page titled "Request Information". On the right side, there is an "Actions:" label followed by a dropdown menu with the text "Select an action". Below this, the following details are listed:

- Request Name:** MyRequest
- Request Date:** 2/21/06 3:55 PM
- Requestor:** sysadmin
- Security Group:** Public
- Completed:** Yes
- Transfer Method:** Pickup
- Priority:** No Priority
- Deliver To Location:** OTHER
Storage-->Other
- Location Comment:** Building A, Room 315.

This page shows the current properties of the selected reservation request, including its name, request date, requestor, transfer method, priority, and delivery location. It also shows whether the reservation request has been completed. A reservation request is considered completed if none of its request items are still pending (in process), on a

waiting list, or checked out—in other words, they are returned, denied, not found, unavailable, or cancelled.

Menu Bar

Depending on your assigned [rights](#), you may also see a menu bar at the top of the page with the following options:

- ❖ **Edit**—This option allows you to [edit](#) the properties of the reservation request. For more information, see page 10-30.
- ❖ **Delete**—This option allows you to [delete](#) the reservation request. For more information, see page 10-35. You can delete reservations only if you have the PCM.Reservation.Delete right (assigned to the predefined ‘pcadmin’ role).
- ❖ **List Request Items**—Choose this option to display the [Items for Request Page](#) (page 10-26), which lists all individual items included in the reservation request.

ITEMS FOR REQUEST PAGE

A reservation may consist of more than one requested item. Use the Items for Request page to view a list of all individual items included in a reservation request.



Note: You must have the PCM.Reservation.Edit [right](#) to access the Items for Request page. By default, this right is assigned to the predefined ‘pcadmin’ role.


To access this page, complete the following steps:

1. Log into the content server.
2. [Search](#) for the reservation request whose request items want to view (see page 10-18).



Note: If you want to see your own requested items, you can open the **My Content Server** tray or top menu and choose **My Reservations**.

The [Reservation Search Results Page](#) (page 10-21) is displayed, which lists all reservations requests that meet your search criteria.

3. Locate the reservation request whose request items you want to view, and choose **Request Information** from its actions popup menu (.

The [Request Information Page](#) (page 10-25) is displayed.

4. Choose **List Request Items** on the menu bar.

Figure 10-7 Items For Request page



Items for Request 'Contracts'					
Reservation					
					Actions: <input type="text" value="Select an action"/>
<input type="checkbox"/>	External Item	Barcode	Status	Transfer Method	Actions
<input type="checkbox"/>	Contracts2005	CONTRACTS2005	In Process	Pickup	
<input type="checkbox"/>	Contracts2004	CONTRACTS2004	In Process	Pickup	

This page shows the items that are included in the reservation request, including their name, barcode, current [status](#) (see page 10-7), and selected [transfer method](#) (see page 10-8).

Page Features

The table below describes the various features of the Items for Request page.

Feature	Description
Selection check boxes	Select the check box for each item that you want to perform the action in the main Actions dropdown menu on. You can select the check box in the column heading to select all items on the page.
External Item	This is the name of the individual physical item in a reservation request.
Barcode	This is the barcode value of the individual item in a reservation request.
Status	This is the current status of the individual item in a reservation request (see page 10-7).
Transfer Method	This is the selected transfer method for the individual item in a reservation request (see page 10-8).

Feature	Description
Actions menu icon ()	<p>If you click on this icon for a search result item, a popup menu is displayed with a number of options relevant to that particular item. The menu options include:</p> <ul style="list-style-type: none"> ❖ Request Item Information—Choose this option to display the information page for the individual request item (see page 10-28). ❖ Delete—Choose this option to delete the selected request item (see page 10-40). You can delete request items only if you have the PCM.Reservation.Delete right (assigned to the predefined ‘pcmadmin’ role by default) <i>and</i> the delete options have been enabled on the Configure Physical Content Manager page (see page 5-2). <p>In addition, the popup menu for individual request items includes a number of actions that enable you to change the status of the item (see page 10-9).</p>
Info icon ()	<p>If you click on this icon, the Request Item Information page (page 10-28) is displayed.</p>

Menu Bar

Depending on your assigned rights, there may be a menu bar at the top of the page. This menu offers a number of options that apply to all items on the page. You can change the view of the page (thumbnail view of headline view). In addition, the menu contains a number of [actions](#) that enable you to change the current request [status](#) of the selected item(s) (see page 10-7).

REQUEST ITEM INFORMATION PAGE


Use the Request Item Information page to view the properties of an individual item in an existing reservation request.




Note: You must have the PCM.Reservation.Edit [right](#) to access the Request Item Information page. By default, this right is assigned to the predefined ‘pcmadmin’ role.

To access this page, complete the following steps:

1. Log into the content server.
2. [Search](#) for the request item whose properties you want to view (see page 10-18).

 **Note:** On the [Search Reservations page](#) (see page 10-18), make sure that you select the “Display individual request items” check box.

 **Note:** If you want to see your own requested items, you can open the **My Content Server** tray or top menu and choose **My Reservations**.

The [Reservation Search Results Page](#) (page 10-21) is displayed, which lists all reservations requests that meet your search criteria.


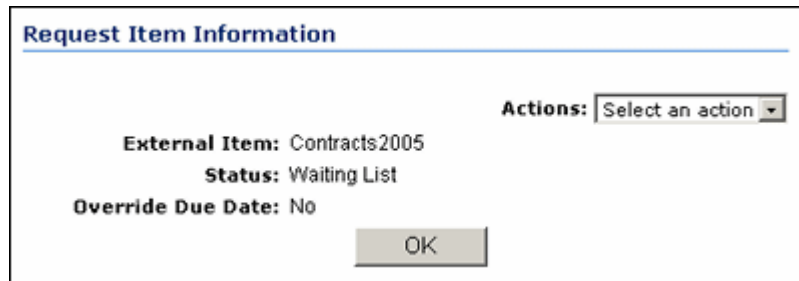
3. Locate the request item that you want to edit, and choose **Request Item Information** from its actions popup menu ().

Figure 10-8 Request Item Information page



Request Item Information

External Item: Contracts2005
 Status: Waiting List
 Override Due Date: No

Actions: Select an action

OK

This page shows the current properties of the selected request item: its name and status, and whether this item can be checked out for a different period of time than the default.

Menu Bar

Depending on your assigned [rights](#), you may also see a menu bar at the top of the page, where you can edit the properties of the request item or delete the item. The Delete option is available only if your PCM administrator has allowed users to delete items from a reservation request. You can delete reservations only if you have the PCM.Reservation.Delete right (assigned to the predefined ‘pcmadmin’ role).

EDIT REQUEST ITEM PAGE

Use the Edit Request Item page to modify the properties of an item in an existing reservation request. You can change the status of the item and add or modify comments.



Note: You must have the PCM.Reservation.Edit [right](#) to access the Edit Request Item page. Also, you must have the PCM.Reservation.Process [right](#) to change the status of an item. By default, both these rights are assigned to the predefined 'pcmadmin' role.

To access this page, complete the following steps:

1. Log into the content server.
2. [Search](#) for the request item that you want to edit (see page 10-18).




Note: On the [Search Reservations page](#) (see page 10-18), make sure that you select the “Display individual request items” check box.



Note: If you want to see your own requested items, you can open the **My Content Server** tray or top menu and choose **My Reservations**.

The [Reservation Search Results Page](#) (page 10-21) is displayed, which lists all reservations requests that meet your search criteria.

3. Locate the request item that you want to edit, and choose **Request Item Information** from its actions popup menu (.


The [Request Item Information Page](#) (page 10-28) is displayed.

4. Choose **Edit** on the menu bar.

Figure 10-9 Edit Request Item page

Page Features

The table below describes the various features of the Edit Request Item page.

Feature	Description
External Item	This is the name of the request item.
Status	This is the status of the request item (see page 10-7). The default is the item's current status. You can select a different status from the dropdown list.  Note: You must have the <code>PCM.Reservation.Process right</code> to change the status of an item.
Checkout Date	If the request item is currently checked out by someone, this field shows the date and time the item was checked out.
Due Date	If the request item is currently checked out by someone, this field shows the date and time the item should be returned (in accordance with the checkout period set on the Configure Physical Content Manager page ; see page 5-2).

Feature	Description
Comments	This field enables you to add or modify comments about the requested item.
Transfer Date	If the request item is currently checked out by someone, this field shows the date and time the item was transferred to its intended recipient (if a timestamp was specified).
Submit Update button	Click this button to submit the updated information about the request item.
Reset button	Click this button to return the original settings before you made any modifications.
Quick Help button	Click this button to display context-specific help information about this page.

REQUEST REPORT PAGES

Physical Content Manager provides a number of predefined reports about reservation requests. The following reports are available:

- ❖ A report that shows all reservations requests that are pending
- ❖ A report that shows all request items that are currently checked out
- ❖ A report that shows all request items that are currently overdue (i.e., not returned on time)



Note: You must have the PCM.Admin.Manager [right](#) to access the request report pages. By default, this right is assigned to the predefined 'pcmadmin' role.

To access the request report pages, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Reports** in the menu bar.

5. Select any of the available reports.

Figure 10-10 Request report page (all pending requests)

Request Date	Requestor	External Item	Barcode	Transfer Method	Actions
3/17/06 8:44 AM	sysadmin	Contracts2005	CONTRACTS2005	Pickup	
3/17/06 8:44 AM	sysadmin	Contracts2004	CONTRACTS2004	Pickup	

This page shows all existing request items that meet the report criteria. The information presented on the page is identical to the information on the [Reservation Search Results page](#) with the individual request items (see page 10-21).

CREATING A RESERVATION REQUEST

Use this procedure to create a new reservation request for one or more physical items.



Note: You must have the `PCM.Reservation.Create` [right](#) to create a new reservation request. By default, this right is assigned to the predefined ‘pcmrequestor’ and ‘pcmadmin’ roles.



Note: You can only make reservation requests for physical (external) items. Error messages will be displayed if you attempt to reserve electronic (internal) items.



Tech Tip: By default, each user can place only one reservation request for the same item. If there are users that make reservation requests on behalf of multiple people (for example, manager assistants), it may be useful to override this behavior. To accomplish this, add the following variable to the `[CS_Instance]/custom/PhysicalContentManager/physicalcontentmanager_environment.cfg` configuration file:

```
AllowMultipleRequests=true
```



Note: If you create a reservation request for a physical item that has other items [within in](#) (see page 12-22), then all these items are included in the reservation as well. You do not see the child items in the request, but when you check out the parent item, all child items are also checked out. You can still create requests for each of the child items, but you cannot check them out until its parent item is returned.

To make a reservation request, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item(s) that you want to reserve, and add them to your [content basket](#).



Note: For more information on searching for physical content, refer to chapter 13. For more information on the content basket, refer to chapter 15.

3. Choose **My Content Server—My Content Basket** to open your content basket.

The [Content Basket page](#) (see page 15-8) is displayed.

4. Select the check box of each physical item that you want to reserve, and choose **Request Selected Items** from the **Request** menu at the top of the page. If you want to reserve all items in your content basket, you can also choose **Request All Items**.

A prompt is displayed asking you whether the selected items should be removed from the content basket after they are reserved.

5. Click **Yes** or **No** according to your preference. If you click **Cancel**, the reservation request is cancelled.

The [Create Request page](#) (see page 10-13) is displayed.

6. Specify the properties of the new reservation request, such as the transfer method, priority, and delivery location.
7. Click **Create** when you are done.

The [status](#) of all request items is now automatically changed to “In Process,” unless their status is already “In Process” or “Checked Out.” In that case, it is changed to “Waiting List.” The items are reserved, and the system administrator is notified of your reservation request. After the administrator processes the reservation request, it can be fulfilled in accordance with the procedures in your organization.

EDITING A RESERVATION REQUEST

Use this procedure to modify the properties of an existing reservation request.



Note: You must have the `PCM.Reservation.Edit` [right](#) to edit a reservation request. By default, this right is assigned to the predefined ‘pcmadmin’ role. You may be allowed to edit your own reservations without this right, depending on a setting on the [Configure Physical Content Manager page](#) (see page 5-2).


To edit a reservation request, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content—Search Reservations**.
The [Search Reservations Page](#) (page 10-18) is displayed.
4. Specify the criteria by which to search, and click **Search**.



Note: If you want to see your own requested items, you can also open the **My Content Server** tray or top menu and choose **My Reservations**.

The [Reservation Search Results Page](#) (page 10-21) is displayed, which lists all reservations requests that meet your search criteria.

5. Locate the reservation request that you want to edit, and choose **Request Information** from its actions popup menu ().

The [Request Information Page](#) (page 10-25) is displayed.

6. Choose **Edit** in the menu bar.

The [Edit Request page](#) (see page 10-14) is displayed.

7. Modify the properties of the reservation request as required, and click **Submit Update** when you are done.

DELETING A RESERVATION REQUEST

Use this procedure to delete an existing reservation request. Deleting a reservation request effectively cancels it.



Note: You must have the PCM.Reservation.Delete [right](#) to delete a reservation request. By default, this right is assigned to the predefined ‘pcmadmin’ role. You may be allowed to delete your own reservations without this right, depending on a setting on the [Configure Physical Content Manager page](#) (see page 5-2).

To delete a reservation request, complete the following steps:


1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content—Search Reservations**.
The [Search Reservations Page](#) (page 10-18) is displayed.

4. Specify the criteria by which to search, and click **Search**.



Note: If you want to see your own requested items, you can also open the **My Content Server** tray or top menu and choose **My Reservations**.

The [Reservation Search Results Page](#) (page 10-21) is displayed, which lists all reservations requests that meet your search criteria.

5. Locate the reservation request that you want to delete, and choose **Request Information** from its actions popup menu (.

The [Request Information Page](#) (page 10-25) is displayed.

6. Choose **Delete** in the menu bar.

The reservation request is deleted immediately, without any further prompts. If there were no errors, a message is displayed stating that the reservation request was deleted successfully.

SEARCHING FOR RESERVATIONS

Use this procedure to search for an existing reservation request in the system.



Note: You must have the PCM.Reservation.Read [right](#) to search for reservations. By default, this right is assigned to the predefined ‘pcmrequestor’ and ‘pcmadmin’ roles.

To search for reservations, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**

The [basic search page](#) is displayed (see page 13-2).

4. **Search—Reservations**.

The [Search Reservations Page](#) (page 10-18) is displayed.

5. Specify the criteria by which you want to search. If you want the search results to display all individual request items contained in reservations in addition to the reservations themselves, select the “Display individual request items” check box.
6. Click **Search** when you are done.

The [Reservation Search Results Page](#) (page 10-21) is displayed, which shows all current reservations in the system that meet the specified criteria.

SAVING RESERVATION SEARCH RESULTS

Use this procedure to save the results of a search for reservations in the system.



Note: You must have the PCM.Reservation.Read [right](#) to save the results of a search for reservations. By default, this right is assigned to the predefined ‘pcmrequestor’ and ‘pcmadmin’ roles.

To save reservation search results, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**

The [basic search page](#) is displayed (see page 13-2).

4. **Search—Reservations.**

The [Search Reservations Page](#) (page 10-18) is displayed.

5. Specify the criteria by which you want to search. If you want the search results to display all individual request items contained in reservations in addition to the reservations themselves, select the “Display individual request items” check box.



Note: If you want to see your own requested items, you can open the **My Content Server** tray or top menu and choose **My Reservations**.

6. Click **Search** when you are done.

The [Reservation Search Results Page](#) (page 10-21) is displayed, which shows all current reservations in the system that meet the specified criteria.

7. Click **Save Search Results** on the menu bar.

The search results are saved to a file.



Note: The file format depends on the Report Format setting on the Configure Records Management page. For further details, refer to the *Records Manager Setup Guide*.


VIEWING RESERVATIONS FOR A PHYSICAL ITEM

Use this procedure to view all outstanding reservation requests for a physical item.



Note: You must have the `Reservation.Read` [right](#) to view the reservations of a physical item. By default, this right is assigned to both predefined physical content management roles ('`pcmrequestor`' and '`pcmadmin`').

To view the reservations of a physical item, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item for which you want to see the current reservation requests. For further details, refer to [Chapter 13 \(Searching for Physical Content\)](#).
3. On the search results page, choose the **Information > View Reservations** option in the item's action popup menu (.



Note: You can also choose the **Information > View Reservations** option on the [Physical Item Information page](#) (page 12-11).

The [Reservation Search Results page](#) is displayed (see page 10-21), which lists all outstanding reservation request for the current physical item.

VIEWING YOUR OWN RESERVATION REQUESTS

Use this procedure to view all of your own outstanding reservation requests.



Note: You must have the `PCM.Reservation.Read` [right](#) to view your own reservation requests. By default, this right is assigned to the predefined '`pcmrequestor`' and '`pcmadmin`' roles.

To view your own reservations, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Reservations**.

The [Reservation Search Results Page](#) (page 10-21) is displayed, which shows all your own current request items (i.e., for which you are the requestor).

EDITING A REQUEST ITEM

Use this procedure to edit the status and/or comments of a request item in an existing reservation request.



Note: You must have the `PCM.Reservation.Edit` right to edit a request item. By default, this right is assigned to the predefined ‘pcmadmin’ role. You may be allowed to edit your own request items without this right, depending on a setting on the [Configure Physical Content Manager page](#) (see page 5-2).

To edit a request item, complete the following steps:


1. Log into the content server.
2. [Search](#) for the request item that you want to edit (see page 10-18).



Note: On the [Search Reservations page](#) (see page 10-18), make sure that you select the “Display individual request items” check box.



Note: If you want to see your own requested items, you can also open the **My Content Server** tray or top menu and choose **My Reservations**.

3. On the [Reservation Search Results Page](#) (page 10-21), locate the request item that you want to edit, and choose **Request Item Information** from its actions popup menu .

The [Request Item Information Page](#) (page 10-28) is displayed.
4. Choose **Edit** on the menu bar.

The [Edit Request Item Page](#) (page 10-30) is displayed.
5. Modify the item status and/or comments, and click **Submit Update** when you are done.

CANCELLING A REQUEST ITEM

Use this procedure to cancel a request item in an existing reservation request. If you cancel a request item, the request for that item is still included in the reservation log (in other words, the item is still on the item list for the reservation, with its status set to “Cancelled”).



Note: You must have the `PCM.Reservation.Edit` [right](#) to cancel a request item. By default, this right is assigned to the predefined ‘`pcmadmin`’ role. You may be allowed to cancel your own request items without this right, depending on a setting on the [Configure Physical Content Manager page](#) (see page 5-2).



Note: You can only cancel request items whose current status is “In Process” or “Waiting List.”

To cancel a request item, complete the following steps:


1. Log into the content server.
2. [Search](#) for the request item that you want to cancel (see page 10-18).



Note: On the [Search Reservations page](#) (see page 10-18), make sure that you select the “Display individual request items” check box.



Note: If you want to see your own requested items, you can also open the **My Content Server** tray or top menu and choose **My Reservations**.

3. In the list of request items, locate the one that you want to cancel, and choose **Cancel** from its actions popup menu ().

DELETING A REQUEST ITEM

Use this procedure to delete a request item from an existing reservation request. If you delete a request item, the request for that item is not included in the reservation log (in other words, the item is no longer in the item list for the reservation).







Note: You must have the `PCM.Reservation.Delete` [right](#) to delete a request item. By default, this right is assigned to the predefined ‘`pcmadmin`’ role. You may be allowed to delete your own request items without this right, depending on a setting on the [Configure Physical Content Manager page](#) (see page 5-2).



Note: You can only cancel request items whose current status is “In Process.”


To cancel a request item, complete the following steps:

1. Log into the content server.
2. [Search](#) for the request item that you want to delete (see page 10-18).




-  **Note:** On the [Search Reservations page](#) (see page 10-18), make sure that you select the “Display individual request items” check box.
-  **Note:** If you want to see your own requested items, you can also open the **My Content Server** tray or top menu and choose **My Reservations**.
 3. In the list of request items, locate the one that you want to cancel, and choose **Delete** from its actions popup menu ().
-  **Note:** You can also delete request items from the [Items for Request Page](#) (page 10-26) or the [Request Item Information Page](#) (page 10-28).

CHANGING THE STATUS OF A REQUEST ITEM

Use this procedure to change the [status](#) of a request item in an existing reservation request.

-  **Note:** You must have the `PCM.Reservation.Edit` [right](#) to change the status of a request item. By default, this right is assigned to the predefined ‘pcmadmin’ role. Depending on a setting on the [Configure Physical Content Manager page](#) (see page 5-2), you may be able to cancel or delete a request item.

To change the status of a request item, complete the following steps”

1. Log into the content server.
 2. [Search](#) for the request item whose status you want to change (see page 10-18).
-  **Note:** On the [Search Reservations page](#) (see page 10-18), make sure that you select the “Display individual request items” check box.
 -  **Note:** If you want to see your own requested items, you can also open the **My Content Server** tray or top menu and choose **My Reservations**.
 3. On the [Reservation Search Results Page](#) (page 10-21), locate the request item whose status you want to change, and choose **Request Item Information** from its actions popup menu ().
The [Request Item Information Page](#) (page 10-28) is displayed.
 4. Choose **Edit** on the menu bar.
The [Edit Request Item Page](#) (page 10-30) is displayed.

5. Select a new status from the **Status** dropdown list, and click **Submit Update** when you are done.

Chapter
11

WORKING WITH CHARGEBACKS

OVERVIEW

This section covers the following topics:

Concepts

- ❖ [About Chargebacks](#) (page 11-2)
- ❖ [Chargeback Process](#) (page 11-3)

Interface

- ❖ [Configure Chargebacks Page](#) (page 11-4)
- ❖ [Browse Invoices Page](#) (page 11-5)
- ❖ [Transactions Not Assigned to an Invoice Page](#) (page 11-7)
- ❖ [Create Charge Transaction page](#) (page 11-9)
- ❖ [Screen Contents and Records for Invoice Page](#) (page 11-10)
- ❖ [Content and Record Criteria Page](#) (page 11-13)
- ❖ [Schedule Screening Report Page](#) (page 11-14)
- ❖ [Transaction Information Page](#) (page 11-15)
- ❖ [View Invoice Details Page](#) (page 11-17)

Tasks

- ❖ [Creating a Transaction](#) (page 11-18)
- ❖ [Deleting a Transaction](#) (page 11-19)
- ❖ [Viewing a Transaction](#) (page 11-20)
- ❖ [Creating an Invoice](#) (page 11-20)
- ❖ [Scheduling an Invoice](#) (page 11-21)
- ❖ [Adjusting an Invoice](#) (page 11-22)
- ❖ [Deleting an Invoice](#) (page 11-22)
- ❖ [Viewing Invoice Information](#) (page 11-23)
- ❖ [Browsing Invoices](#) (page 11-24)
- ❖ [Printing an Invoice](#) (page 11-24)
- ❖ [Printing Invoice Data](#) (page 11-25)
- ❖ [Marking an Invoice As Paid](#) (page 11-26)

ABOUT CHARGEBACKS

Chargebacks are fees that are charged to people or businesses for the use of storage facilities or actions performed on physical items in the storage facilities. The Physical Content Manager application enables you to generate invoices for the storage, use, reservation, and destruction of the managed content. These invoices can then be sent to the internal or external customers in accordance with the applicable business procedures.

The system administrator sets up charge types (billable events), payment types (methods of payment), and billers (users or organizations that will be billed). Once set up, each billable action (creation, reservation, storage, destruction) can be transacted to a particular biller by creating invoices which contain one or more transactions on physical items that have occurred for these billers.

A **charge type** is a defined transaction that is triggered by certain criteria. For example, creation of a physical item of object type ‘Box’ and media type ‘Paper’ may cost, say, \$5 per occurrence, while reservation of an item with priority ‘ASAP Rush’ may cost \$20. Every time someone performs an action that meets the criteria of a charge type, a billable transaction is recorded for the associated user or organization (biller). The system will always use the charge type that is most specific—in other words, if charge type A has two criteria and charge type B has the same two criteria plus another one, it will be charge type

B that is recorded for a transaction that meets all three criteria of charge type B (even though it also meets the two criteria of charge type A).

Each charge type has an amount of money associated with it, which can be per record or for a specific period of time. For example, you could charge a fee every time a physical item is created (or reserved or destroyed), or you could charge a monthly fee to store a physical item.

A **payment type** specifies how internal or external customers pay for the services rendered. There are three predefined payment types (credit card, check, and invoice), but you can also create custom payment types.

Billers are internal or external users or organizations that are charged for the services rendered on physical items. They will receive the invoices generated by Physical Content Manager (in accordance with the applicable business procedures) and make the payments for the chargebacks.

Once the charge types, payment types, and billers are defined, they can be used to create invoices to submit to the different billers for each billable event (transaction). These invoices can be run on an as-needed basis or they can be scheduled automatically in accordance with defined criteria.

CHARGEBACK PROCESS

The typical fulfillment process of a chargeback is as follows:



Note: Your specific reservation process may differ from the one described here, depending on the procedures in place in your organization.

1. A user performs a billable action (for example, creates, reserves, or stores a physical item in storage).

As soon as the user performs one of these actions on the physical item, those items are matched against all defined charge types. Each action on each item is matched against current transactions. If there is no match to a transaction, the action will not be recorded for chargeback.

2. The transaction is recorded in the system. The system administrator should make sure that there are transactions in place to cover as many variations as possible regarding actions on physical items. In this way chargeback can be made more automatic and require less individual attention for each request that is made for a physical item.

3. The system administrator generates an invoice, either automatically through using scheduled invoices or manually by generating individual invoices.
4. The invoice is sent to the biller according to business procedures. The Physical Content Manager application does not e-mail invoices or otherwise deliver them.
5. The bill is paid or otherwise considered paid according to company procedures.
6. Once the bill is paid, the system administrator marks the invoice as paid within the Physical Content Manager application.

CONFIGURE CHARGEBACKS PAGE

The Configure Chargebacks page is the main page where you can perform a number of configuration and administrative tasks related to chargebacks.



Note: You must have the PCM.Admin.Manager and CBC.CharegBacks.Admin [rights](#) to access this page. By default, this right is assigned to the predefined ‘pcmadmin’ role.

To access this page, complete the following steps:

1. Log into the content server as an administrator.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

Figure 11-11 Configure Chargebacks page

Configure Chargebacks

▼ Configure ▼ Browse Add Transaction Screen Charges

Enable Automatic Processing of Creation Charges

Enable Automatic Processing of Destruction Charges

Enable Automatic Processing of Reservation Charges

Submit Update Reset Quick Help



Note: See [Configuring Chargebacks](#) (page 5-11) for the configuration tasks related to chargebacks.

Menu Bar

A menu bar is available to users with the right permission level. The following configuration options are available in the **Configure** menu:

- ❖ **Configure**—This opens a menu with a number of configuration options. See [Configuring Chargebacks](#) (page 5-11) for more information.
- ❖ **Browse**—This menu has the following options:
 - **Invoices**—Click this option to open the [Browse Invoices Page](#) (page 11-5).
 - **Transactions with no invoice**—Click this option to open the [Transactions Not Assigned to an Invoice Page](#) (page 11-7).
- ❖ **Add Transaction**—Click this option to open the [Create Charge Transaction page](#) (page 11-9).
- ❖ **Screen Charges**—Click this option to open the [Screen Contents and Records for Invoice Page](#) (page 11-10).

BROWSE INVOICES PAGE

Use the Browse Invoices Page page to view all invoices. All invoices will appear until specifically deleted from this list. From this page each individual invoice can be viewed, edited, deleted, or printed.

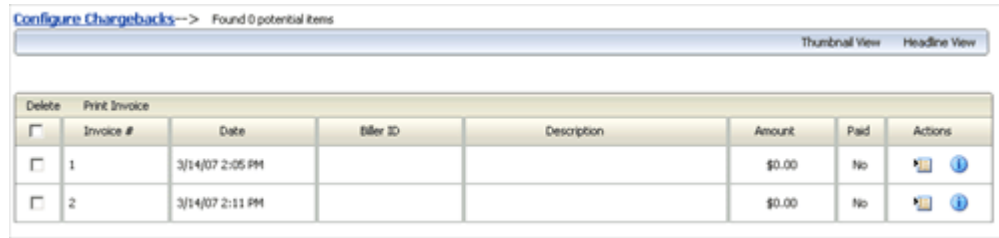


Note: You must have the PCM.Admin.Manager and CBC.ChargeBacks.Admin [rights](#) to access this page. By default, this right is assigned to the predefined ‘pcmadmin’ role.

To access this page, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.
The [Configure Physical Content Management page](#) is displayed (see page 5-2).
4. Choose **Configure—Chargebacks**.
The [Configure Chargebacks Page](#) (page 5-14) is displayed.
5. Choose **Browse—Invoices**.


Figure 11-1 Browse Invoices page



Page Features

The table below describes the various features of the Browse Invoices page.

Feature	Description
Delete	Check the box to mark the invoice for deletion.
Invoice #	The invoice number, listed sequentially.
Date	The date the invoice was created.
Biller ID	ID of the biller the invoice is sent to or otherwise assigned to.
Description	Short description of the invoice (if entered).
Amount	Total amount due on the invoice.
Paid	Listed 'Yes' or 'No' depending on whether the invoice was paid.

Feature	Description
Actions menu icon ()	<p>If you click on this icon, a popup menu is displayed with the following options (depending on your assigned rights):</p> <ul style="list-style-type: none"> ❖ Invoice Information—Choose this option to display the information to the selected invoice. ❖ View Transactions—Choose this option to display the individual transactions for the invoice. ❖ Adjust Invoice—Choose this option to edit the selected invoice. ❖ Mark Paid—Choose this option to mark the invoice paid. ❖ Print Invoice—Choose this option to print the selected invoice ❖ Print Invoice Data—Choose this option to print the specific invoice data for the selected invoice. ❖ Delete Invoice—Choose this option to delete the selected invoice.

TRANSACTIONS NOT ASSIGNED TO AN INVOICE PAGE

Use the Transactions Not Assigned to an Invoice page to view the transactions that have been made, but not yet collected into an invoice to be sent to a biller. New transactions can also be added from this page.



Note: You must have the `PCM.Admin.Manager` and `CBC.ChargeBacks.Admin` [rights](#) to perform this inquiry. By default, this right is assigned to the predefined ‘pcadmin’ role.

To access this page, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management](#) page is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.


5. Choose **Browse—Transactions with no invoice**.

Figure 11-2 Transactions not assigned to an invoice page

Delete	Date	Description	Charge Type ID	Action	Amount	External Item	Actions
<input type="checkbox"/>	3/8/07 11:20 AM	Box of CDs	Basic Monthly Sotrage	Storage	\$1.00		
<input type="checkbox"/>	3/8/07 1:37 PM	box cd	Basic Monthly Sotrage	Storage	\$1.00		
<input type="checkbox"/>	3/8/07 1:42 PM	microfilm box	Basic Monthly Sotrage	Storage	\$1.00		
<input type="checkbox"/>	3/8/07 1:47 PM	Yet another box of cds	Basic Monthly Sotrage	Storage	\$1.00		

Page Features

The table below describes the various features of the Transactions not assigned to an invoice page.

Feature	Description
Delete	Check the box to mark the transaction for deletion.
Date	The date the transaction was created.
Description	The description of the transaction.
Charge Type ID	The charge type of the transaction as defined when created on the Create/Edit Charge Type Page (page 5-17).
Action	Creation, destruction, reservation, or storage
Amount	Total amount charged for the transaction.
External Item	The external item associated with eht transaction, of applicable..
Actions menu icon ()	If you click on this icon, a popup menu is displayed with options (depending on your assigned rights) to view or delete the transaction.

CREATE CHARGE TRANSACTION PAGE

Use the Create Charge Transaction page to create transactions. The transaction will include the type of object and media as well as the amount and charge type and other information. Once a transaction is created it can be then collected into an invoice.



Note: You must have the PCM.Admin.Manager, CBC.ChargeBacks.Admin, and CBC.Chargebacks.Create [rights](#) to perform this creation. By default, this right is assigned to the predefined 'pcmadmin' role.

To access this page, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).


4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Click **Add Transaction**.

Figure 11-3 Create Charge Transaction page

Create Charge Transaction

Date 

Description

Charge Type ID

Charge Amount

Object Type

Media Type

Name

Requestor

Page Features

The table below describes the various features of the Create Charge Transaction page.

Feature	Description
Date	The date the transaction is created.
Description	The description of the transaction.
Charge Type ID	The charge type of the transaction as defined when created on the Create/Edit Charge Type Page (page 5-17).
Charge Amount	The amount that the transaction will be billed for.
Object Type	The object type of the physical items being transacted.
Media Type	The media type of the physical items being transacted.
Name	The name of the physical item being transacted.
Requestor	The person requesting the transacton, and who will be charged on the invoice once the transaction is posted to an invoice.
Create button	Click this button to create the transaction.
Reset button	Click this button to reset the page to its initial default settings.
Quick Help button	Click this button to display context-specific help information about this page.

SCREEN CONTENTS AND RECORDS FOR INVOICE PAGE

Use the Screen Contents and Records for Invoice page to filter transactions based on selected parameters and use the filtered transactions to create a new invoice. This can be done at any time, or it can also be scheduled to run at any defined interval.



Note: You must have the PCM.Admin.Manager and CBC.ChargeBacks.Admin [rights](#) to perform this inquiry. By default, this right is assigned to the predefined 'pcmadmin' role.

To access this page, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Click **Screen Charges**.

Figure 11-4 Screen Contents and Records for Invoice page

Screen Contents and Records for Invoice

Content and Record Criteria

Include Records for Storage

Include Storage Period

Biller ID

Description

Results Options

Results Per Page:
Sort By:

Page Features

The table below describes the various features of the Screen Content and Records for Invoice page.

Feature	Description
Content and Record Criteria	Defines te particular transactions and records used to create the invoice. Information is filled when Select is pressed and the Content and Record Criteria Page (page 11-13) is displayed in a pop-up window.
Include Records for Storage	Mark the checkbox to include storage items as well as the physical items within it.
Charge Type ID	The charge type of the transaction as defined when created on the Create/Edit Charge Type Page (page 5-17).
Charge Amount	The amount that the transaction will be billed for.
Object Type	The object type of the physical items being transacted.
Media Type	The media type of the physical items being transacted.
Name	The name of the physical item being transacted.
Requestor	The person requesting the transacton, and who will be charged on the invoice once the transaction is posted to an invoice.
Generate Invoice button	Click this button to generate the invoice as a PDF file.
Clear button	Click this button to reset the page to its initial default settings.
Schedule button	Click this button to schedule the screening action, so it is performed automatically. See the <i>Records Manager System Maintenance Guide</i> for more information on scheduling.
Quick Help button	Click this button to display context-specific help information about this page.

CONTENT AND RECORD CRITERIA PAGE

Use the Content and Records Criteria page to filter transactions based on selected parameters and use the filtered transactions to create a new invoice.



Note: You must have the PCM.Admin.Manager and CBC.ChargeBacks.Admin [rights](#) to perform this inquiry. By default, this right is assigned to the predefined 'pcmadmin' role.

To access this page, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Click **Screen Charges**.

The [Screen Contents and Records for Invoice Page](#) (page 11-10) is displayed.

6. Click **Select**.

Figure 11-5 Content and Record Criteria page (partial)

The screenshot shows the 'Content and Record Criteria' page with the following fields and controls:

- Content ID:** Substring dropdown, text input field.
- Title:** Substring dropdown, text input field.
- Security Group:** Substring dropdown, dropdown menu.
- Author:** Substring dropdown, text input field.
- Is Record:** Substring dropdown, dropdown menu.
- Record Activation Date:** From/To date pickers.
- Record Expiration Date:** From/To date pickers.
- Delete Approve Date:** From/To date pickers.
- Is Cutoff:** Substring dropdown, dropdown menu.
- Record Cutoff Date:** From/To date pickers.

Buttons for 'OK' and 'Reset' are located at the top right of the form area.

This page includes all fields that can be included in the [Screen Contents and Records for Invoice Page](#) (page 11-10) criteria for searching transactions to include on an invoice.

SCHEDULE SCREENING REPORT PAGE

Use the Schedule Screening Report page to define the filter for transactions based on selected parameters and use the filtered transactions to create a new invoice. This can be done at any time, or it can also be scheduled to run at any defined interval.



Note: You must have the PCM.Admin.Manager and CBC.ChargeBacks.Admin [rights](#) to perform this inquiry. By default, this right is assigned to the predefined 'pcmadmin' role.

To access this page, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Click **Screen Charges**.

The [Screen Contents and Records for Invoice Page](#) (page 11-10) is displayed.

6. Click **Schedule**.

Figure 11-6 The Schedule Screening Report page

Schedule Screening Report

Report Name

Start Date

Is Recurring

Period

Period Name

Page Features

The table below describes the various features of the Schedule Screening Report page.

Feature	Description
Report Name	The name of the scheduled report.
Start Date	The first date to run the report and automatically create invoices.
Is Recurring	Check the box to make the report run on a regular schedule.
Period	The number of regular periods the scheduled report waits before running again. For example, to run a screening report every two weeks, the entered period should be '2' and the period name is 'weeks'. This field is only available when the Is Recurring checkbox is checked.
Period Name	The length of time the scheduled report waits before running again. For example, to run a screening report every two weeks, the entered period should be '2' and the period name is 'weeks'. This field is only available when the Is Recurring checkbox is checked.
OK button	Click this button to close this dialog.
Reset button	Click this button to reset the page to its initial default settings.
Quick Help button	Click this button to display context-specific help information about this page.

TRANSACTION INFORMATION PAGE

Use the Transactions Information page to view the specific information about the selected transaction.



Note: You must have the PCM.Admin.Manager, CBC.ChargeBacks.Admin, and CBC.ChargeBacks.Read [right](#) to perform this task. By default, this right is assigned to the predefined 'pcadmin' role.

To access this page, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Choose **Browse—Transactions with no invoice**.

The [Transactions Not Assigned to an Invoice Page](#) (page 11-7) is displayed.


6. Click the **Info** icon  for the transaction whose information you want to see.

Figure 11-7 Transaction Information page



Page Features

The table below describes the various features of the Transaction Information page.

Feature	Description
Date	The date the transaction was created.
Description	The description of the transaction.
Charge Type ID	The charge type of the transaction as defined when created on the Create/Edit Charge Type Page (page 5-17).
Action	Creation, destruction, reservation, or storage.

Feature	Description
Charge Amount	Total amount charged for the transaction.
Object Type	The external item associated with the transaction, of applicable..
Media Type	The media type of the physical item being transacted.
Name	This field does not appear if blank.
Requestor	The person requesting the transaction, and who will be charged on the invoice once the transaction is posted to an invoice.

VIEW INVOICE DETAILS PAGE

Use the View Invoice Details page to view the specific information for the selected invoice.



Note: You must have the PCM.Admin.Manager, CBC.ChargeBacks.Admin, and CBC.ChargeBacks.Read [right](#) to perform this task. By default, this right is assigned to the predefined 'pcadmin' role.

To access this page, complete the following steps:


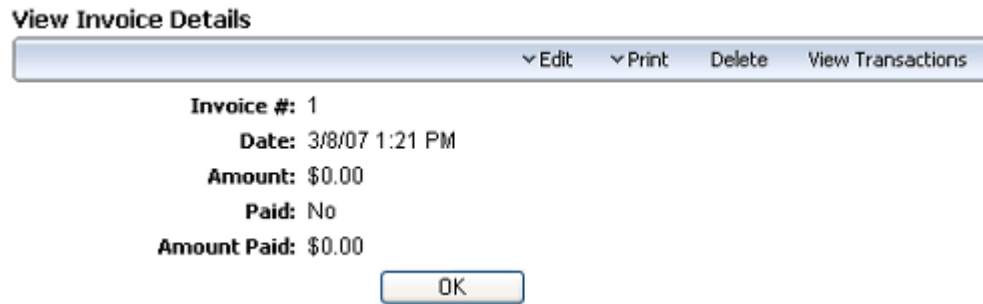
1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.
The [Configure Physical Content Management page](#) is displayed (see page 5-2).
4. Choose **Configure—Chargebacks**.
The [Configure Chargebacks Page](#) (page 5-14) is displayed.
5. Choose **Browse—Invoice**.
The [Browse Invoices Page](#) (page 11-5) is displayed.
6. Click the **Info** icon  for the invoice whose information you want to see.

Figure 11-8 View Invoice Details page



Page Features

The table below describes the various features of the View Invoice Details page.

Feature	Description
Invoice #	The number of the invoice as sequentially created.
Date	The date the invoice was created.
Amount	The total amount of the invoice, combining all charges for all transactions.
Paid	Lists whether or not the invoice has been paid.
Amount Paid	Amount the biller has paid toward the total amount of the invoice.

CREATING A TRANSACTION

Use this procedure to create a new transaction.



Note: You must have the PCM.Admin.Manager, CBC.ChargeBacks.Admin, and CBC.Chargebacks.Create [rights](#) to perform this creation. By default, this right is assigned to the predefined 'pcmadmin' role.

To create a transaction, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Click **Add Transaction**.

The [Create Charge Transaction page](#) (page 11-9) is displayed.

6. Specify the properties of the transaction and click **OK**.

The new transaction is listed on the [Transactions Not Assigned to an Invoice Page](#) (page 11-7).

DELETING A TRANSACTION

Use this procedure to delete an existing transaction.



Note: You must have the PCM.Admin.Manager, CBC.ChargeBacks.Admin, and CBC.ChargeBacks.Delete [rights](#) to perform this deletion. By default, this right is assigned to the predefined 'pcmadmin' role.

To delete a transaction, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Click **Browse—Transactions with no invoice**.

The [Transactions Not Assigned to an Invoice Page](#) (page 11-7) is displayed.

6. In the list of transactions, click the **Delete** checkbox for the one you wish to delete.
7. Click **Delete**.

VIEWING A TRANSACTION

Use this procedure to view a transaction.



Note: You must have the PCM.Admin.Manager, CBC.ChargeBacks.Admin, and CBC.ChargeBacks.Read [rights](#) to perform this inquiry. By default, this right is assigned to the predefined 'pcmadmin' role.


To view a transaction, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Click the **Info** icon  for the transaction whose information you want to see.

The [Transaction Information Page](#) (page 11-15) is displayed.

CREATING AN INVOICE

Use this procedure to create a new invoice.



Note: You must have the PCM.Admin.Manager, CBC.ChargeBacks.Admin, and CBC.Chargebacks.Create [rights](#) to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To create an invoice, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Click **Screen Charges**.

The [Screen Contents and Records for Invoice Page](#) (page 11-10) is displayed.

6. Specify the properties of the invoice. The transactions to add to the invoice are added by entering the search criteria for transactions and records in the Content and Record Criteria text box. This box is filled by clicking **Select**.

The [Content and Record Criteria Page](#) (page 11-13) is displayed.

7. Enter the necessary criteria to filter the desired transactions. Click **Generate Invoice**.

The invoice will appear at the bottom of the [Browse Invoices Page](#) (page 11-5).

SCHEDULING AN INVOICE

Use this procedure to create a scheduled invoice. Scheduled invoices are generated automatically in accordance with the set criteria.



Note: You must have the PCM.Admin.Manager, CBC.ChargeBacks.Admin, and CBC.Chargebacks.Create [rights](#) to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To create a scheduled invoice, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Click **Screen Charges**.

The [Screen Contents and Records for Invoice Page](#) (page 11-10) is displayed.

6. Specify the properties of the invoice. The transactions to add to the invoice are added by entering the search criteria for transactions and records in the Content and Record Criteria text box. This box is filled by clicking **Select**.

The [Content and Record Criteria Page](#) (page 11-13) is displayed.

7. Enter the necessary criteria to filter the desired transactions. Click **Schedule**.

The [Schedule Screening Report Page](#) (page 11-14) is displayed.

8. Enter the necessary report criteria and click **OK**.

Each invoice, when generated, will appear at the bottom of the [Browse Invoices Page](#) (page 11-5).

ADJUSTING AN INVOICE

Use this procedure to edit an invoice.



Note: You must have the PCM.Admin.Manager, CBC.ChargeBacks.Admin, and CBC.Chargebacks.Edit [rights](#) to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To create a transaction, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Choose **Browse—Invoice**.

The [Browse Invoices Page](#) (page 11-5) is displayed.

6. For the desired invoice, click the Action menu icon () and choose **Edit—Adjust Invoice**.

A screen is displayed where you can adjust the information on the invoice.

DELETING AN INVOICE

Use this procedure to delete an invoice.



Note: You must have the PCM.Admin.Manager, CBC.ChargeBacks.Admin, and CBC.ChargeBacks.Delete [right](#) to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To delete a transaction, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Choose **Browse—Invoices**.

The [Browse Invoices Page](#) (page 11-5) is displayed.

6. In the list of invoices, click the **Delete** checkbox for the one you wish to delete.

7. Click **Delete**.

VIEWING INVOICE INFORMATION

Use this procedure to view an invoice.



Note: You must have the PCM.Admin.Manager, CBC.ChargeBacks.Admin, and CBC.ChargeBacks.Read [right](#) to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To view an invoice, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Choose **Browse—Invoices**.

The [Browse Invoices Page](#) (page 11-5) is displayed.

6. Click the **Info** icon  for the invoice whose information you want to see.

The [View Invoice Details Page](#) (page 11-17) is displayed.

BROWSING INVOICES

Use this procedure to view a list of all invoices.



Note: You must have the PCM.Admin.Manager, CBC.ChargeBacks.Admin, and CBC.ChargeBacks.Read [right](#) to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To browse invoices, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.

The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Choose **Browse—Invoices**.

The [Browse Invoices Page](#) (page 11-5) is displayed.

PRINTING AN INVOICE

Use this procedure to print an invoice.



Note: You must have the PCM.Admin.Manager, CBC.ChargeBacks.PrintInvoices [rights](#) to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To print an invoice, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Choose **Browse—Invoices**.

The [Browse Invoices Page](#) (page 11-5) is displayed.

6. Click the Action menu icon () for the invoice that you want to print, and choose **Print—Print Invoice**.
7. A PDF version of the invoice is generated which you can save locally for further processing or distribution.

PRINTING INVOICE DATA

Use this procedure to print the transaction information for all transactions contained in an invoice. This is not equivalent to an invoice and is not intended to be sent to a biller.



Note: You must have the PCM.Admin.Manager, CBC.ChargeBacks.PrintInvoices [rights](#) to perform this task. By default, this right is assigned to the predefined ‘pcmadmin’ role.

To print invoice data, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Choose **Browse—Invoices**.

The [Browse Invoices Page](#) (page 11-5) is displayed.

6. Click the Action menu icon () for the invoice whose data you want to print, and choose **Print—Print Invoice Data**.
7. A PDF version of the invoice data is generated which you can save locally for further processing or distribution.

MARKING AN INVOICE AS PAID

Use this procedure to mark an invoice as paid.



Note: You must have the PCM.Admin.Manager, CBC.ChargeBacks.Admin, and CBC.Chargebacks.Edit [rights](#) to perform this task. By default, this right is assigned to the predefined 'pcmadmin' role.

To mark an invoice as paid, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Configure Physical Content**.


The [Configure Physical Content Management page](#) is displayed (see page 5-2).

4. Choose **Configure—Chargebacks**.

The [Configure Chargebacks Page](#) (page 5-14) is displayed.

5. Choose **Browse—Invoices**.

The [Browse Invoices Page](#) (page 11-5) is displayed.

6. Click the Action menu icon () for the invoice that you want to mark as paid, and choose **Print—Mark Paid**.

Chapter 12

WORKING WITH PHYSICAL CONTENT

OVERVIEW

This section deals with creating and managing physical items with the Physical Content Manager application. It covers the following topics:

Concepts

- ❖ [About Physical \(External\) Content](#) (page 12-2)

Interface

- ❖ [Create/Edit Physical Item Page](#) (page 12-3)
- ❖ [Select Storage Location Dialog](#) (page 12-10)
- ❖ [Physical Item Information Page](#) (page 12-11)
- ❖ [Freeze Details Page](#) (page 12-14)

Tasks

- ❖ [Creating a Physical Item as a Record](#) (page 12-15)
- ❖ [Creating a Physical Item as Non-Record Content](#) (page 12-18)
- ❖ [Creating a Physical Item Within Another Item](#) (page 12-22)
- ❖ [Editing a Physical Item](#) (page 12-23)

- ❖ [Deleting a Physical Item](#) (page 12-23)
- ❖ [Moving a Physical Item](#) (page 12-24)
- ❖ [Freezing and Unfreezing a Physical Item](#) (page 12-25)
- ❖ [Adding Physical Items To Your Content Basket](#) (page 12-28)
- ❖ [Printing a Label for a Physical Item](#) (page 12-29)
- ❖ [Viewing Reservations for a Physical Item](#) (page 12-30)
- ❖ [Marking a Physical Item as Reviewed](#) (page 12-30)



Note: For further details about checking in records and non-record content, refer to the *Records Manager User Guide*.

See also:

- [Chapter 10 \(Working With Reservations\)](#)
- [Chapter 13 \(Searching for Physical Content\)](#)
- [Chapter 14 \(Processing Physical Content\)](#)

ABOUT PHYSICAL (EXTERNAL) CONTENT

As opposed to internal, electronic content managed by the Oracle suite of content management products, no copy of external, physical content is stored in the content server. Only its metadata (including storage information and retention schedule, if any) is stored. When you “check in” an external, physical content item, you provide its basic metadata information and you specify where the item is stored by selecting a location in the defined [storage space hierarchy](#) (see chapter 6). If you have the appropriate privileges, you can also assign a retention schedule to the item, which determines its life cycle.



Note: You can [create physical items within other physical items](#) (see page 12-22). This may be useful in situations where you want to create a “container” physical item (for example, of [object type](#) “Box”) and add a number of “content” physical items within it (for example, of [object type](#) “Folder”).

CREATE/EDIT PHYSICAL ITEM PAGE

Create Physical Item Page



Note: You must have the PCM.Physical.Create [right](#) to access the Create Physical Item page. By default, both predefined physical content management roles ('pcmrequestor' and 'pcmadmin') have this right. If you want to be able to assign a life cycle (i.e., retention schedule) to the physical item, you also need the Record.Create right in Records Manager.

Use the Create Physical Item page to “check in” a new physical content item—that is, provide its metadata, storage information, and retention schedule (if any) to Physical Content Manager. To access this page, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**

The [basic search page](#) is displayed (see page 13-2).

4. Click **Create Item** on the menu bar.



Note: You can also access the Create Physical Item page by clicking **Physical** on the **New Check In** dropdown menu of the Content Server interface.


Figure 12-1 Create Physical Item page

Edit Physical Item Page




Note: You must have the PCM.Physical.Edit [right](#) to access the Edit Physical Item page. By default, both predefined physical content management roles ('pcmrequestor' and 'pcmadmin') have this right.

Use the Edit Physical Item page to modify the properties of an existing physical content item. To access this page, complete the following steps:




1. Log into the content server.
2. [Search](#) for the physical item whose properties you want to edit. For further details, refer to [Chapter 13 \(Searching for Physical Content\)](#).
3. On the search results page, choose the **Edit > Edit External Item** option in the action popup menu () of the physical item that you want to edit.





Note: You can also open the item's content information page () and choose **Edit > Edit External Item**.



Page Features

The table below describes the various features of the Create Physical Item and Edit Physical Item pages.

Feature	Description
Name	<p>Enter a unique name for the physical item. This field is view-only on the Edit Physical Item page.</p> <ul style="list-style-type: none"> ❖ Required ❖ Maximum number of characters: 30 <p> Note: If you use accented letters and any other characters other than a-z, A-Z, and 0-9 in the names of physical items, these characters are represented as hexadecimal values in barcodes, as shown in physical item labels (for example, 'Ü' = 'C39C').</p> <p> Note: If the content server is using DB2 or Oracle as the database, all names of physical items are automatically converted to upper case, even if you enter them in lower case.</p> <p> Note: If the content server is set up to auto-generate content IDs (in the System Properties utility), then the name of a physical item is generated automatically, and the Name field is not displayed on the Create Physical Item page. It is displayed on the Edit Physical Item page, but you cannot modify it.</p>

Feature	Description
Title	Specify a descriptive title for the physical item. <ul style="list-style-type: none"> ❖ Required ❖ Maximum number of characters: 80
Filer	Specify the person who submitted the physical item. The default is the user that is currently logged in. If you have administrative permission, you can select an alternative filer in the dropdown list of available users. <ul style="list-style-type: none"> ❖ Required.
Security Group	Select the security group that the physical content item should be assigned to. Security groups are sets of files with the same access permissions. <ul style="list-style-type: none"> ❖ Default: Public ❖ Required.
Object Type	Select the type of the physical content item. There are a number of predefined object types (see page 5-57), but you can also create your own (see page 5-56). <p> Note: You do not need to select an object type for a physical item. However, if you do, you should select a type that matches the object type of the storage location that you assign the item to (if one was specified for the location; see page 6-18). Otherwise an error message is displayed and you cannot check in the physical item.</p>
Media Type	Select the type of information carrier of the physical content item. The available media types depend on the selected object type. There are a number of predefined media types (see page 5-67), but you can also create your own (see page 5-66).

Feature	Description
Current Location	<p>Specify the current location of the physical item.</p> <p>You can manually enter a location, but it is much easier to click the Browse button and open the Select Storage Location dialog, where you can drill down the storage space hierarchy and select the location.</p> <p>After you have selected a location, the Current Location field contains a reference to that location. This will either be the barcode specifically provided for that location on its definition page, or, if none is specified, a 19-digit number. Below the Current Location field, you can see the full hierarchical storage path to the selected location.</p> <p>If you do not provide a current location, it is automatically set to “OTHER” (i.e., assigned to the ‘Other’ storage location).</p> <p> Note: On the Edit Physical Item page, only users with the PCM.Physical.Move right can modify an item’s current location (assigned to the predefined ‘pcadmin’ role by default).</p>
Current Location Comments	<p>If required, enter a comment about the current location (for example, handling instructions or the reason the content item is there).</p>

Feature	Description
Permanent Location	<p>Specify the permanent storage location of the physical item. This is the location that is permanently assigned to the content item, which may be temporarily moved to a different location (for example, due to a reservation). In that case, its current location is updated.</p> <p>You can manually enter a location, but it is much easier to click the Browse button and open the Select Storage Location dialog, where you can drill down the storage space hierarchy and select the location.</p> <p>After you have selected a location, the Permanent Location field contains a reference to that location. This will either be the barcode specifically provided for that location on its definition page, or, if none is specified, a 19-digit number. Below the Permanent Location field, you can see the full hierarchical storage path to the selected location.</p> <p>If you do not provide a permanent location, it is automatically set to match the current location.</p> <p> Note: On the Edit Physical Item page, only users with the PCM.Physical.Move right can modify an item's permanent location (assigned to the predefined 'pcadmin' role by default).</p>
Barcode Label	<p>Specify the label used for the barcode for the physical content item (i.e., the text printed below the barcode on the item label).</p> <p>If you do not provide a barcode label, it is automatically set to match the specified item name (in all upper-case letters, with spaces stripped).</p> <p> Note: If the content server is set up to auto-generate content IDs (in the System Properties utility), then the barcode matches the automatically generated name (typically a number, possibly preceded by a prefix; for example, ID_002319).</p>
Type	<p>Select the content type from the dropdown menu, which lists all defined content types in the content server.</p>

Feature	Description
Is Record	<p>If you select this check box, the external, physical content item is considered a record, and a number of records-related metadata fields are added to the page.</p> <p>If you select this check box, the security group is automatically changed to RecordsGroup.</p> <p>For more information about checking in records, refer to the <i>Records Manager User Guide</i>.</p>
Record Activation Date, Record Expiration Date, originating Organization, Record Format, Supplemental Markings Subject To Audit, Audit, Reviewer Review Period	<p>These fields are specific to Records Manager. See the Records Manager documentation for further details.</p>
Create button (Create page only)	<p>Click this button to check in the information about the physical content item into the content server.</p>
Submit Update button (Edit page only)	<p>Click this button to submit the updated definition of the physical content item.</p>
Reset button	<p>If you are creating a new physical content item, clicking this button resets the page to its initial default settings.</p> <p>If you are editing an existing physical content item, this returns the original content item settings before you made any modifications.</p>
Quick Help button	<p>Click this button to display context-sensitive help information about this page.</p>



Note: If you entered this page through the retention schedules in Records Manager, then the top of the page will include the full retention schedule path

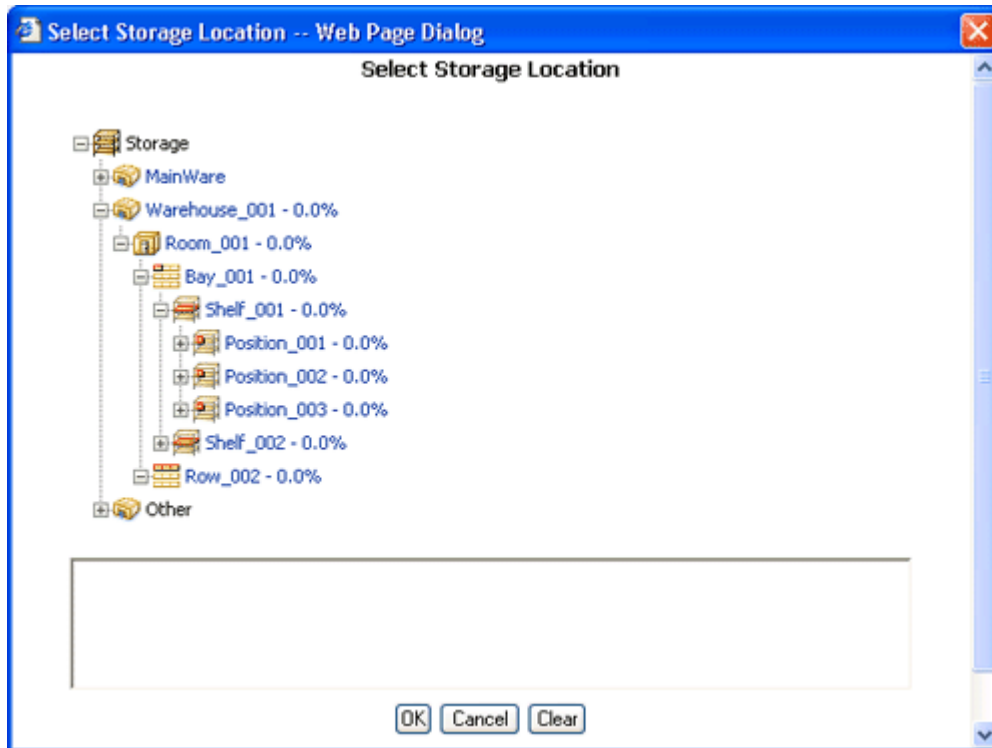
See also:

- [Creating a Physical Item as a Record](#) (page 12-15)
- [Creating a Physical Item as Non-Record Content](#) (page 12-18)
- [Creating a Physical Item Within Another Item](#) (page 12-22)

SELECT STORAGE LOCATION DIALOG

Use the Select Storage Location dialog to select the storage location of a physical content item. To access this dialog, click the **Browse** button next to either of the location fields on the [Create Physical Item](#) page or [Edit Physical Item](#) page (see page 12-3).

Figure 12-2 Select Storage Location dialog



The main box at the top shows the defined storage space hierarchy. You can drill down the hierarchy to navigate to the location where the physical item is stored. If you select a location in the hierarchy, the box at the bottom shows the full navigation path to the selected location.

You can use the plus and minus icons in front of a storage location to unfold or collapse all its child locations.

You can only select storage locations that allow storage of items in them (by default, only the locations of type “Position”). All selectable locations are visually marked as hyperlinks.

When you have selected the desired location, click **OK** to return to the [Create Physical Item page](#) or [Edit Physical Item page](#) (see page 12-3). You can click **Clear** to delete the current storage path and select a new one.

PHYSICAL ITEM INFORMATION PAGE

Use the Physical Item Information page to view information about an existing physical item.



Note: You must have the `PCM.Physical.View` [right](#) to view information about a physical item. By default, both predefined physical content management roles (‘`pcmrequestor`’ and ‘`pcmadmin`’) have this right.

To access this page, complete the following steps:



1. Log into the content server.
2. [Search](#) for the physical item whose properties you want to view. For further details, refer to [Chapter 13 \(Searching for Physical Content\)](#).
3. On the search results page, click on the info icon () for the item whose information you want to view. Alternatively, you can also choose **Information > External Item Information** from the actions popup menu (.

Figure 12-3 Physical Item Information page

Physical Item Information

[Information](#) [Edit](#) [Create Physical Item Within](#) [Delete External Item](#) [Print Label](#)

Name: PhysicsUnit_001
Title: Physics Classroom Equipment
Author: sysadmin
Security Group:
Object Type: All
Media Type: Mixed
Current Location: 5150E65260531402653
 Storage->Warehouse_001-->Room_001-->Bay_001-->Shelf_001-->Position_001
Permanent Location: 51511E6b264531442653
 Storage->Warehouse_001-->Room_001-->Bay_001-->Shelf_001-->Position_001
Barcode Label: PHYS CALUNIT001
Type:
Is Record: No
Category ID:
Folder ID:
Delete Approve Date:
Is Cutoff: No
Record Filing Date: 2/27/07 4:41 PM
Originating Organization: Default
Record Format: Text
Supplemental Markings:
Subject To Audit: No
Audit:
Is Frozen: No
Subject In Review: No
Reviewer:
Review Period:
Record Destroy Date:

Related Content

[Revisions](#)
[Supersedes](#)
[Supporting Content](#)
[Supported Content By](#)
[Cross-References](#)
[Cross-Referenced By](#)

This page shows the current properties of the physical item, including its basic metadata (name, title, filer, and security group), its freeze status, its object and media types, its storage location, and barcode label.

Please note the following:

- ❖ If the content server is set up to auto-generate content IDs (in the System Properties utility), then the name of a physical item was generated automatically. It will typically be a number, possibly preceded by a prefix (for example, ID_002319).
- ❖ If the physical item has been assigned a life cycle (i.e., retention schedule and disposition rules), then the information page also includes a Retention Schedule Information section, which provides disposition processing and security information for the item. For more information, refer to the Records Manager documentation.
- ❖ If the physical item is currently [checked out](#) (see chapter 10), its current location is set to the value of the [deliver-to location](#) as specified when the associated reservation request was [created](#) (see page 10-13). If no location was provided, the current location is set to “OTHER.”
Also, if a [location comment](#) was specified for the associated reservation request, then the Current Location Comments field will show this comment. Otherwise it contains the login name of the user who created the reservation request.
- ❖ If the physical item is [contained within](#) another physical item (see page 12-22), the current location and/or permanent location field includes a **Container Details** link, which opens the information page of the parent physical item (the “container”).

Menu Bar

Depending on your assigned rights, there may be a menu bar at the top of the page. This menu may include the following options (depending on the item status):

- ❖ **Information > List Items that belong here**—Choose this option to view a list of all physical items whose *permanent* location is assigned to the current physical item. This is useful only for physical items that have other physical items [contained in them](#) (see page 12-22).
- ❖ **Information > List Items that are actually here**—Choose this option to view a list of all physical items whose *actual* location is assigned to the current physical item. This is useful only for physical items that have other physical items [contained in them](#) (see page 12-22). The list does not include any items that would normally be in the storage location, but that are currently checked out.
- ❖ **Information > View Reservations**—Choose this option to [view the reservations](#) for the current physical item (see page 12-30).
- ❖ **Information > Freeze Details**—Choose this option to open the [Freeze Details page](#) for the current physical item (see page 12-14).

- ❖ **Edit > Edit External Item**—Choose this option to [edit](#) the properties of the current physical item (see page 12-23).
- ❖ **Edit > Freeze**—Choose this option to [freeze](#) the current physical item (see page 12-25).
- ❖ **Edit > Unfreeze**—Choose this option to [unfreeze](#) the current physical item (see page 12-25).
- ❖ **Create Physical Item Within**—Choose this option to [create](#) a new physical item within the current physical item (see page 12-22).
- ❖ **Delete External Item**—Choose this option to [delete](#) the current physical item (see page 12-23).
- ❖ **Print Label**—Choose this option to [print a label](#) for the current physical item (see page 12-29).



FREEZE DETAILS PAGE

Use the Freeze Details page to view detailed freeze information about a physical item—that is, a list of all freezes that are currently applied to the item.



Note: You must have the Record.Freeze/Unfreeze right in Records Manager to view the freeze details of a physical item. By default, this right is assigned to Records Manager’s predefined ‘rmaadmin’ role. Neither of the predefined physical content management roles (‘pcmrequestor’ and ‘pcmadmin’) have this right by default.

To access this page, complete the following steps:

1. Log into the content server.
2. [Search](#) for the frozen physical item whose freeze details you want to view. For further details, refer to [Chapter 13 \(Searching for Physical Content\)](#).
3. Click on the item’s information icon () or choose the **Edit > External Item Information** option in its action popup menu (.

The [Physical Item Information page](#) (page 12-11) is displayed.


4. Choose **Information > Freeze Details** on the menu bar.



Note: This option is only available if the item is currently frozen.

Figure 12-4 Freeze Details page for a physical item

Physical Freeze Details for 'Contracts for 2004'			
Records File Plan --> Series 1 --> Category 1			
			Actions: <input type="text" value="Select an action"/>
Freeze Name	Freeze Reason	Inherited From	Actions
Legal Case A	Required for legal case A		
Legal Case B	Required for legal case B		

This page shows all freezes that are currently applied to the physical item. If the item inherited its freeze status from its parent folder, that folder's name is shown in the Inherited From column for the inherited freeze. If you click the info icon () for a freeze in the list, the content information page of the record is displayed.

To save the information on this page to a file, choose the **Save Freeze Details** option from the menu bar. The report will be saved in the report format specified on the Configure Records Management page (see the *Records Manager Setup Guide*).



Note: If the generated report file is in PDF format, it cannot be viewed using Adobe Acrobat 5.x or earlier. You need at least version 6.0 of the Acrobat software.

CREATING A PHYSICAL ITEM AS A RECORD

When creating a new physical item as a record, you check its metadata, storage information, and retention schedule into the content server. This information is subsequently used to track the physical item and manage its life cycle.

There are two ways to create physical items as records:

- ❖ [On the Create Physical Item page in Physical Content Manager](#) (page 12-16)
- ❖ [Within the retention schedules of Records Manager](#) (page 12-17)

See also:

- [Creating a Physical Item as Non-Record Content](#) (page 12-18)
- [Creating a Physical Item Within Another Item](#) (page 12-22)

Using the Create Physical Item Page in Physical Content Manager

Use this procedure to create a new physical item as a record using the [Create Physical Item page](#) in Physical Content Manager.



Note: You must have the PCM.Physical.Create right in Physical Content Manager *and* the Record.Create right in Records Manager to create a new physical item as a record. By default, the PCM.Physical.Create right is assigned to both predefined physical content management roles ('pcmrequestor' and 'pcmadmin'). The Record.Create right is assigned to the predefined records management roles 'rmaprivileged' and 'rmaadmin'.

To create the new physical item as a record, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**

The [basic search page](#) is displayed (see page 13-2).

4. Click **Create Item** on the menu bar.



Note: You can also access the Create Physical Item page by clicking **Physical** on the **New Check In** dropdown menu of the Content Server interface.

The [Create Physical Item page](#) (page 12-3) is displayed.

5. Select the **Is Record** check box.
6. Provide the information for the new physical item as required, including its storage and record-related information.. Do not forget to assign a retention category or records folder to the physical item in order to set its retention schedule.



Note: For more information about the record-specific fields, refer to the *Records Manager User Guide*.

7. Click **Create** to submit the information about the new physical item to the content server.

The [Physical Item Information page](#) for the new physical item is displayed (see page 12-11).

Within the Retention Schedules of Records Manager

Use this procedure to create a new physical item as a record within the retention schedules hierarchy in Records Manager. You do this by placing the item directly into a retention category or records folder.



Note: You must have the PCM.Physical.Create right in Physical Content Manager *and* the Record.Create right in Records Manager to create a new physical item as a record. By default, the PCM.Physical.Create right is assigned to both predefined physical content management roles ('pcmrequestor' and 'pcmadmin'). The Record.Create right is assigned to the predefined records management roles 'rmaprivileged' and 'rmaadmin'.

To create the new physical item as a record, complete the following steps:

1. Log into the content server.
2. Open the **Browse Content** tray or top menu.
3. Click **Retention Schedules**.
4. Navigate to the records retention category or records folder in the hierarchy where you want to add the physical item, either using the exploring pages or, in the Trays layout, using the tree view on the left.
5. On the menu bar of the exploring page of the category or folder, choose **Create > Create Physical Record**.

The [Create Physical Item page](#) (page 12-3) is displayed, with the full retention schedule path to the current retention category at the top of the page.

Figure 12-5 Full retention schedule path on Create Physical Item page

The screenshot shows the 'Create Physical Item' page. At the top, the retention schedule path is displayed: 'Retention Schedules --> Series 1 --> Category 1'. Below this, there are four form fields:

- * Name: A text input field.
- Title: A text input field.
- * Author: A dropdown menu with 'sysadmin' selected.
- * Security Group: A dropdown menu with 'RecordsGroup' selected.



Note: For more information about the record-specific fields, refer to the *Records Manager User Guide*.

6. Provide the information for the new physical item as required.



Note: The page does not contain the Life Cycle field as the physical item is automatically assigned the retention and disposition rules of the current (or inherited) retention category.

7. Click **Create** to submit the information about the physical item to the content server.

The [Physical Item Information page](#) for the new physical item is displayed (see page 12-11). Please note that the **Is Record** field is set to “Yes.”

CREATING A PHYSICAL ITEM AS NON-RECORD CONTENT

When creating a new physical item as non-record content, you check its metadata, storage information, and retention schedule (if any) into the content server. This information is subsequently used to track the physical item and manage its life cycle.

There are three ways to create physical items as non-record content:

- ❖ [On the Create Physical Item page in Physical Content Manager](#) (page 12-18)
- ❖ [Within the storage space hierarchy in Physical Content Manager](#) (page 12-19)
- ❖ [Within the retention schedules of Records Manager](#) (page 12-21)

See also:

- [Creating a Physical Item as a Record](#) (page 12-15)
- [Creating a Physical Item Within Another Item](#) (page 12-22)

Using the Create Physical Item Page In Physical Content Manager

Use this procedure to create a new physical, non-record item using the [Create Physical Item page](#) in Physical Content Manager.



Note: You must have the PCM.Physical.Create **right** to create a new physical, non-record item. By default, both predefined physical content management roles (‘pcmrequestor’ and ‘pcmadmin’) have this right.

To create the new physical, non-record item, complete the following steps:

1. Log into the content server.

2. Open the **External Content** tray or top menu.
3. Click **Physical Content**
The [basic search page](#) is displayed (see page 13-2).
4. Click **Create Item** on the menu bar.



Note: You can also access the Create Physical Item page by clicking **Physical** on the **New Check In** dropdown menu of the Content Server interface.

The [Create Physical Item page](#) (page 12-3) is displayed.

5. Provide the information for the new physical item as required, including its storage information.



Note: If you have the Record.Create right in Records Manager, you can assign a life cycle (i.e., retention schedule) and publication date to the non-record physical item.

6. Click **Create** to submit the information about the new physical item to the content server.

The [Physical Item Information page](#) for the new physical item is displayed (see page 12-11).

Within the Storage Space Hierarchy in Physical Content Manager

Use this procedure to create a new physical, non-record item within the [storage space hierarchy](#) in Physical Content Manager. You do this by placing the item directly into a storage location.



Note: You must have the PCM.Physical.Create [right](#) to create a new physical, non-record item. By default, both predefined physical content management roles ('pcmrequestor' and 'pcmadmin') have this right.

To create the new physical, non-record item, complete the following steps:

1. Log into the content server.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.

The Exploring page for the top level (called "Storage") is displayed.

4. Navigate to the storage location where you want to add the new non-record physical item, either using the [exploring pages](#) or, in the Trays layout, using the [tree view](#) on the left.




Note: You can add items only to storage locations that can hold content.

5. In the menu bar on the exploring page of the storage location, choose **Create Physical Item**.



Note: If this option is not in the menu, the storage location has not been configured to store content.



Note: You can also add a physical item by choosing **Create Physical Item** in the actions icon menu () of a storage location.

The [Create Physical Item page](#) (page 12-3) is displayed, with the Current Location and Permanent Location fields already pointing to the current storage location.

Figure 12-6 Pre-filled Current Location and Permanent Location fields

Current Location	<input type="text" value="2779770392809020499"/>	<input type="button" value="Browse..."/>
	Storage-->Warehouse_001-->Room_001	
Current location comments	<input type="text"/>	
Permanent Location	<input type="text" value="2779770392809020499"/>	<input type="button" value="Browse..."/>
	Storage-->Warehouse_001-->Room_001	
Barcode Label	<input type="text"/>	
* Type	<input type="text" value="ADACCT - Acme Accounting Department"/>	

6. Provide the information for the new physical item as required.



Note: If you have the Record.Create right in Records Manager, you can assign a life cycle (i.e., retention schedule) and publication date to the non-record physical item.

7. Click **Create** to submit the information about the physical item to the content server.

The [Physical Item Information page](#) for the new physical item is displayed (see page 12-11).

Within the Retention Schedules of Records Manager

Use this procedure to create a new physical, non-record item within the retention schedules hierarchy in Records Manager. You do this by placing the item directly into a retention category or records folder. This procedure is useful only if you want to assign a retention schedule to the physical item.



Note: You must have the PCM.Physical.Create right in Physical Content Manager *and* the Record.Create right in Records Manager to create a new physical, non-record item. By default, the PCM.Physical.Create right is assigned to both predefined physical content management roles ('pcmrequestor' and 'pcmadmin'). The Record.Create right is assigned to the predefined records management roles 'rmaprivileged' and 'rmaadmin'.

To create a new physical, non-record item, complete the following steps:

1. Log into the content server.
2. Open the **Browse Content** tray or top menu.
3. Click **Retention Schedules**.
4. Navigate to the non-record retention category in the hierarchy where you want to add the physical item, either using the exploring pages or, in the Trays layout, using the tree view on the left.
5. On the menu bar of the exploring page of the category or folder, choose **Create > Check in New Physical Item**.

The [Create Physical Item page](#) (page 12-3) is displayed, with the full retention schedule path to the current non-record retention category at the top of the page.

Figure 12-7 Full retention schedules path on Create Physical Item page

The screenshot shows the 'Create Physical Item' page. At the top, the retention schedule path is displayed: 'Retention Schedules --> Series 1 --> Category 1'. Below this, there are four form fields with labels: '* Name' (text input), 'Title' (text input), '* Author' (text input with 'sysadmin' and a dropdown menu), and '* Security Group' (dropdown menu with 'RecordsGroup').

6. Provide the information for the new physical item as required.



Note: The page does not contain the Life Cycle field as the physical item is automatically assigned the retention and disposition rules of the current retention category.

7. Click **Create** to submit the information about the physical item to the content server.

The [Physical Item Information page](#) for the new physical item is displayed (see page 12-11). Please note that the **Is Record** field is set to “No.”


CREATING A PHYSICAL ITEM WITHIN ANOTHER ITEM

Use this procedure to create a new physical item within another, existing physical item. This may be useful in situations where you want to create a “container” physical item (for example, of [object type](#) “Box”) and add a number of “content” physical items within it (for example, of [object type](#) “Folder”).



Note: You must have the PCM.Physical.Create [right](#) to create a physical item within another item. By default, both predefined physical content management roles (‘pcmrequestor’ and ‘pcmadmin’) have this right.

To create the physical item within another item, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item within which you want to create another physical item. For further details, refer to [Chapter 13 \(Searching for Physical Content\)](#).
3. On the search results page, choose the **Create Physical Item Within** option in the item’s action popup menu (.



Note: You can also choose the Create Physical Item Within option on the [Physical Item Information page](#) (page 12-11).

The [Create Physical Item page](#) (page 12-3) is displayed.

4. Provide the information for the new physical item as required. The current and permanent location are already provided, pointing to the “parent” physical item in the storage hierarchy.



Note: If you have the Record.Create right in Records Manager, you can assign a life cycle (i.e., retention schedule) and publication date to the non-record physical item.

5. Click **Create** to submit the information about the new physical item to the content server.

The [Physical Item Information page](#) for the new physical item is displayed (see page 12-11).

See also:

- [Creating a Physical Item as a Record](#) (page 12-15)
- [Creating a Physical Item as Non-Record Content](#) (page 12-18)


EDITING A PHYSICAL ITEM

Use this procedure to edit the properties of an existing physical item.



Note: You must have the PCM.Physical.Edit [right](#) to edit a physical item. By default, both predefined physical content management roles ('pcmrequestor' and 'pcmadmin') have this right.

To edit a physical item, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item whose properties you want to edit. For further details, refer to [Chapter 13 \(Searching for Physical Content\)](#).
3. On the search results page, choose the **Edit > Edit External Item** option in the item's action popup menu (.



Note: You can also choose the Edit > Edit External Item option on the [Physical Item Information page](#) (page 12-11).

The Edit Physical Item page is displayed.

4. Modify the physical item properties as required, and click **Submit Update** when you are done.

The item's information page is displayed, with the updated properties.

DELETING A PHYSICAL ITEM

Use this procedure to delete an existing physical item. When deleting a physical item, you remove its metadata, storage, and retention information from the content server. This means the item can no longer be tracked and managed.




Note: You must have the PCM.Physical.Delete [right](#) to delete a physical item. By default, this right is assigned to the predefined physical content management role 'pcmadmin'.



Note: You cannot delete a physical item if it has other physical items [contained within it](#) (see page 12-22).

To delete a physical item, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item that you want to delete. For further details, refer to [Chapter 13 \(Searching for Physical Content\)](#).
3. On the search results page, choose the **Delete External Item** option in the item's action popup menu (.



Note: You can also choose the Delete External Item option on the [Physical Item Information page](#) (page 12-11).

The physical item is deleted immediately, without any further prompts. If there were no errors, a message is displayed stating that the physical item was deleted successfully.



MOVING A PHYSICAL ITEM

Use this procedure to move an existing physical item from one location in the [storage space hierarchy](#) to another.



Note: You must have the PCM.Physical.Move [right](#) to move a physical item. By default, both predefined physical content management roles ('pcmrequestor' and 'pcmadmin') have this right.

To move a physical item, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item that you want to move. For further details, refer to [Chapter 13 \(Searching for Physical Content\)](#).
3. On the search results page, click on the item's information icon () or choose the **Information > External Item Information** option in its action popup menu (.

The [Physical Item Information page](#) (page 12-11) is displayed.

4. Modify the Current Location and/or Permanent Location fields as required, and click **Submit Update** when you are done.

The item's information page is displayed again, with the updated location(s).

FREEZING AND UNFREEZING A PHYSICAL ITEM

Use this procedure to freeze or unfreeze an existing physical item. Freezing a physical item inhibits disposition processing for that item. For example, it will not be flagged for destruction, even if that action is due, until the item is unfrozen (i.e., its frozen status revoked). This may be necessary in order to comply with legal or audit requirements (for example, as a result of litigation).

You can apply more than one freeze to an item. You can view the [Freeze Details page](#) (see page 12-14) for the record to see a list of all freezes currently applied to the record.

If you freeze a physical item that has other physical items [within it](#) (see page 12-22), then all these items are frozen as well.



Note: After a physical item has been frozen, you cannot edit its metadata.




Note: For more information about freezes, please refer to the Records Manager documentation.





Note: You must have the Record.Freeze/Unfreeze right in Records Manager to freeze or unfreeze a physical item. By default, this right is assigned to Records Manager's predefined 'rmaadmin' role. Neither of the predefined physical content management roles ('pcmrequestor' and 'pcmadmin') have this right by default.

Freezing a Physical Item

To freeze a physical item, complete the following steps:

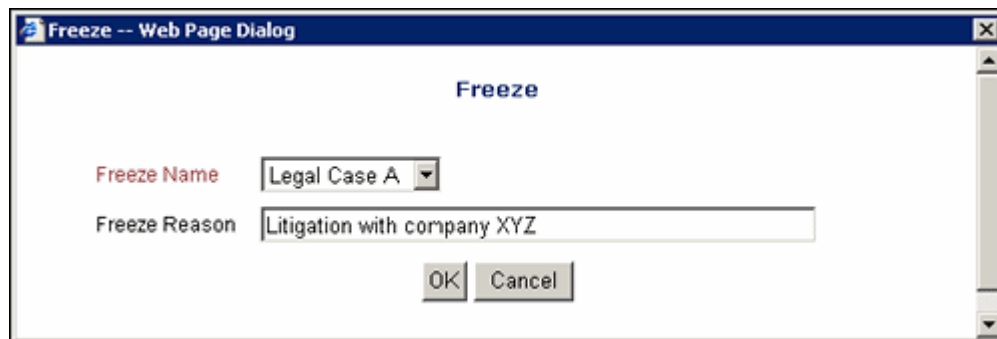
1. Log into the content server.
2. [Search](#) for the physical item that you want to freeze. For further details, refer to [Chapter 13 \(Searching for Physical Content\)](#).
3. On the search results page, choose the **Edit > Freeze** option in the item's action popup menu (.

 **Note:** You can also choose the Edit > Freeze option on the [Physical Item Information page](#) (page 12-11).

 **Note:** If you want to freeze all items on the [search results page](#), you can also choose the **Freeze Results** option in the menu bar on that page.

The Freeze dialog is displayed.

Figure 12-8 Selecting a freeze to apply to a physical item

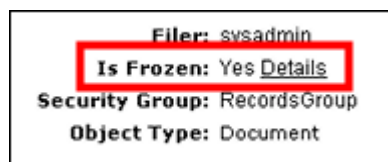



In the Freeze Name dropdown list, select the freeze that should be applied to the record. The list contains all freezes that have been defined in Records Manager. If you want, you can also provide a reason for the freeze. If you do not want to enter a reason, simply leave the text box empty.

4. Click **OK** to confirm the freeze. If you click **Cancel**, the entire action is aborted.

If you confirmed the action, the information page of the affected item displays “Is Frozen: Yes” as well as a **Details** hyperlink, which links to the [Freeze Details page](#) for the item (see page 12-14).

Figure 12-9 Frozen status of physical item



 **Note:** Once an item is frozen, you cannot edit its freeze reason. If the freeze is no longer correct, you should unfreeze the item and freeze it with a new reason.

Unfreezing a Physical Item

To unfreeze a physical item (i.e., cancel its frozen status), complete the following steps:

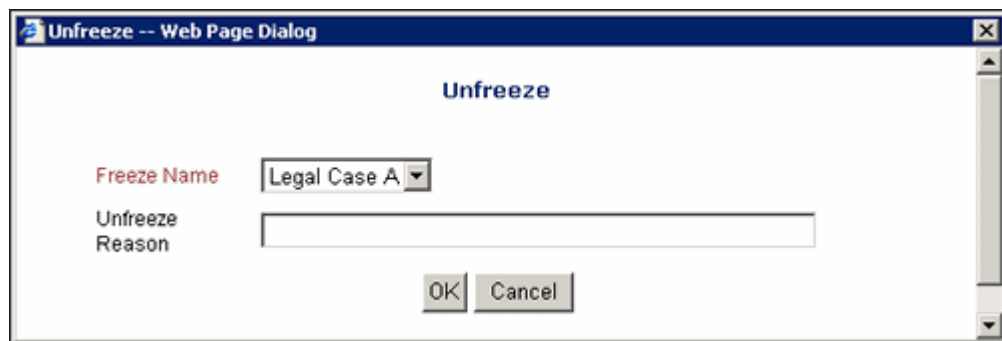
1. Log into the content server.
2. **Search** for the physical item that you want to unfreeze. For further details, refer to [Chapter 13 \(Searching for Physical Content\)](#).
3. On the search results page, choose the **Edit > Unfreeze** option in the item's action popup menu (☰).



Note: You can also choose the Edit > Unfreeze option on the [Physical Item Information page](#) (page 12-11).

The Unfreeze dialog is displayed.

Figure 12-10 Selecting a freeze to cancel for a physical item

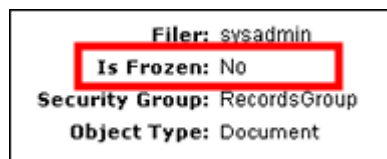


In the Freeze Name dropdown list, select the freeze that should be cancelled for the item. The list contains all freezes currently applied to the item (at the item level). If you want, you can also provide a reason for the unfreeze action. If you do not want to enter a reason, simply leave the text box empty.

4. Click **OK** to confirm the freeze. If you click **Cancel**, the entire action is aborted.

If you confirmed the action, the Retention Schedule Information area of the content information page displays “Is Frozen: No” and no **Details** hyperlink is displayed.

Figure 12-11 Unfrozen status of physical item





Important: Multiple freeze may be applied to an item. Therefore, after an item has been unfrozen, the Actions dropdown menu for that item may continue to include an **Unfreeze** option if other freezes are still applied to the item.

ADDING PHYSICAL ITEMS TO YOUR CONTENT BASKET

Use this procedure to add one or more physical items to your [content basket](#). The content basket serves as a personal storage space for users where they can temporarily store multiple items for later processing. For example, if users want to [reserve](#) physical items for check-out, they search for all items that they want to reserve, and add each of them to their content basket. After adding all items, they can [open](#) their content basket and [make a reservation request](#) for the items in the basket.

Once an item is added to your content basket, you can access the content basket from the My Content Server tray or top menu.



Note: For further details on the content basket, refer to [Chapter 15 \(Working With the Content Basket\)](#).

To add a physical item to the content basket, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item(s) that you want to add to your content basket. For further details, refer to [Chapter 13 \(Searching for Physical Content\)](#).
3. On the search results page, select the check box of each item that you want to add to your content basket.
4. Click **Content Basket** in the menu bar at the top of the page, and choose any of the following options depending on what you want to add to the content basket:
 - **Add Selected Items to Basket - Native**
 - **Add Selected Items to Basket - Web**
 - **Add All Items to Basket - Native**
 - **Add All Items to Basket - Web**



Note: The “All Items” options add all items *on the current page* to the content basket, which may not be all items in the complete search results. If you want to add all items in the complete search results list, you need to add them per page.

The Content Basket page is displayed, which lists all items currently in the content basket.

PRINTING A LABEL FOR A PHYSICAL ITEM

Use this procedure to print a [label for a physical item](#). By default, the label contains a barcode for the item, as well as its name, title, security group, and account (if applicable).




Note: You must have the PCM.Admin.PrintLabel [right](#) to create labels for physical items. By default, this right is assigned to the predefined 'pcmadmin' role.



Note: For more information about labels for physical items, refer to page 9-11.

To print a label for a physical item, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item for which you want to print a label.
For further details, refer to [Chapter 13 \(Searching for Physical Content\)](#).
3. On the search results page, choose the **Print Label** option in the item's action popup menu (.



Note: You can also choose the Print Label option on the [Physical Item Information page](#) (page 12-11).

The file is generated in the format specified on the Configure Physical Content Management page. A PDF file can be viewed and printed using Adobe Acrobat 6.0 or higher, and PLB files can be viewed and printed using the [Print Report Utility](#) (see appendix A). This is an optional utility that can be installed from the PCM distribution media and also from `[CS_Instance_Dir]/custom/PhysicalContentManager/Client`. For further details on this utility, refer to [Appendix A \(Using the Print Report Utility\)](#).

Figure 12-12 Label for physical item



VIEWING RESERVATIONS FOR A PHYSICAL ITEM

Use this procedure to view all outstanding reservation requests for a physical item.




Note: You must have the Reservation.Read [right](#) to view the reservations of a physical item. By default, this right is assigned to both predefined physical content management roles ('pcmrequestor' and 'pcmadmin').



Note: For more information about reservations, refer to [Chapter 10 \(Working With Reservations\)](#).

To view the reservations of a physical item, complete the following steps:

1. Log into the content server.
2. [Search](#) for the physical item for which you want to see the current reservation requests. For further details, refer to [Chapter 13 \(Searching for Physical Content\)](#).
3. On the search results page, choose the **Information > View Reservations** option in the item's action popup menu (.



Note: You can also choose the Information > View Reservations option on the [Physical Item Information page](#) (page 12-11).

The [Reservation Search Results page](#) is displayed (see page 10-21), which lists all outstanding reservation request for the current physical item.


MARKING A PHYSICAL ITEM AS REVIEWED

Use this procedure to mark a physical item as reviewed, after receiving a notification that the item was due for review (as part of a [disposition instruction](#); see chapter 14):

1. Log into the content server.
2. [Search](#) for the physical item that you want to mark as reviewed.
For further details, refer to [Chapter 13 \(Searching for Physical Content\)](#).



Note: You can also [view](#) all items that are due for review in the My Retention Assignments area under My Content Server (see page 14-5).

3. On the search results page, choose the **Mark Reviewed** option in the item's action popup menu (.



Note: You can also choose the Mark Reviewed option on the [Physical Item Information page](#) (page 12-11).



Note: The Mark Reviewed option is available only for items that were marked as “Subject to Review” when the item was [created](#) (see page 12-3).

4. You are prompted to enter a reason for the action. If desired, enter a reason, and click **OK** to confirm. If you do not want to enter a reason, leave the text box empty, and click **OK**. If you click **Cancel**, the entire action is aborted.



Note: You can see the review history of an item by choosing **Information > Recent Reviews** in the menu bar on that item’s information page.

Chapter 13

SEARCHING FOR PHYSICAL CONTENT

OVERVIEW

This section explains how to find physical items managed by the Physical Content Manager application. It covers the following topics:

Concepts

- ❖ [About Searching for Physical Content](#) (page 13-2)

Interface

- ❖ [Basic Search Page](#) (page 13-2)
- ❖ [Advanced Search Page](#) (page 13-4)
- ❖ [Search Results Page](#) (page 13-6)
- ❖ [Screening for Content and Records Page](#) (page 13-9)
- ❖ [Content and Records Screening Results Page](#) (page 13-10)

Tasks

- ❖ [Browsing to Physical Content](#) (page 13-11)
- ❖ [Searching for Physical Content](#) (page 13-11)
- ❖ [Screening for Physical Content](#) (page 13-12)

ABOUT SEARCHING FOR PHYSICAL CONTENT

Contrary to internal (electronic) content items managed by the Oracle suite of content management products, no copies of external, physical content items are typically stored in the content server. Only their metadata (including storage information and retention schedules, if any) are stored.

You can search for information about physical items managed by Physical Content Manager using the [basic search page](#) (see below) or the [advanced search page](#) (see page 13-4). Alternatively, if you have the appropriate rights, you can also use Records Manager's [screening features](#) (see page 13-9) to find physical content.



Note: You can also find physical content items by browsing through the [storage space hierarchy](#) (see chapter 6).



Note: For more general information about searching for content, refer to the *Content Server User Guide* and *Records Manager User Guide*.

BASIC SEARCH PAGE

Use the basic search page to search for physical content items managed by the Physical Content Manager application using some common search criteria, and also to perform a number of other tasks related to physical content.



Note: You must have the PCM.Physical.Read [right](#) to access this page. By default, both predefined physical content management [roles](#) ('pcmrequestor' and 'pcmadmin') have this right.

To access this page, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**.



Note: You can also access this page by choosing the 'Physical' option on the Search dropdown menu at the top of the Content Server interface.

Figure 13-1 Basic search page

The screenshot shows a web interface titled "Search Physical Items". At the top, there is a navigation bar with three buttons: "Search", "Create Item", and "Configure". Below this, there are four input fields stacked vertically: "Title", "Name", "Barcode Label", and "Current Location". The "Current Location" field has a "Browse..." button to its right. Below these fields, there are two input fields for "Record Filing Date From" and "To", separated by the word "To". At the bottom of the form, there is a "Sort By:" label followed by two dropdown menus: the first is set to "Name" and the second is set to "Descending". To the right of these dropdowns is a "Search" button.

Here you can search for physical items based on a number of common criteria. To build your own search query using custom criteria, choose **Search—Advanced Search**. This opens the [Advanced Search Page](#) (page 13-4).

Menu Bar

This page contains a menu bar with the following options (depending on your assigned rights):

- ❖ **Search**—This menu has the following options:
 - **Advanced Search**
Choose this option to create a new search using custom criteria. See [Advanced Search Page](#) (page 13-4) for further details.
 - **Search Reservations**
Choose this option to search all existing reservations for physical content items. See [Chapter 10 \(Working With Reservations\)](#) for further details.
- ❖ **Create Item**
Choose this option to submit a physical content item to the content server (i.e., store its metadata, location, and retention information). See [Chapter 12 \(Working With Physical Content\)](#) for further details.
- ❖ **Configure**
Choose this option to open the [Configure Physical Content Management page](#) (page 5-2), where you can perform a number of configuration and administration tasks.

ADVANCED SEARCH PAGE

The advanced search page enables you to define your own search queries based on custom criteria. Search criteria are all selected individually, and can be combined in multiple variations using AND/OR logic. Advanced searches cannot be saved.



Note: You must have the PCM.Physical.Read [right](#) to access this page. By default, both predefined physical content management [roles](#) ('pcmrequestor' and 'pcmadmin') have this right.

To access the advanced search page, open the **Search** menu on the [Basic Search Page](#) (page 13-2), and choose **Advanced Search**.




Figure 13-2 Advanced search page

Page Features

The table below describes the various features of the Advanced Search Physical Items page.



Note: The menu bar on this page is the same as the one on the [Basic Search Page](#) (page 13-2).

Feature	Description
Search Commands	
Search button (top and bottom of page)	Searches for physical items in the system that meet your criteria, and displays the results in the Search Results Page (page 13-6).
Clear button (top and bottom of page)	Clears all search criteria fields and selections, and returns the page to its initial blank appearance.
Search Builder	
Search criteria fields	<p>This section allows you to build a search query by specifying metadata fields and values that you want to search on.</p> <p>Some fields are text entry fields, while others also allow you to select a value from a dropdown list. If a field requires a date, you can click on the calendar icon next to it to select a date from a popup dialog.</p> <p> Note: See the <i>Content Server User Guide</i> and <i>Records Manager User Guide</i> for general information about searching for content items.</p>
Remove criterion icon ()	Click this icon to remove a criterion from your search query.
Add criterion icon ()	Click this icon to add another criterion to your search query.
Results Options	
Results Per Page	<p>Specifies the maximum number of items displayed on each search results page.</p> <p>❖ Default: 20.</p>
Sort By	Select an attribute by which to sort the results. The list contains all the search criteria fields on the page.

Feature	Description
Sort order list	Specifies the sort order of the screening results: <ul style="list-style-type: none"> ❖ Ascending (default)—Sorts alphabetical results in A-Z order; numerical results in 0-9 order; and date results in oldest to newest order. ❖ Descending—Sorts alphabetical results in Z-A order; numerical results in 9-0 order; and date results in newest to oldest order.

Metadata Search Operators

Search operators can be used to refine the search criteria for a number of metadata fields. These operators are listed as options in dropdown lists immediately to the left of each field. For an explanation of the available search operators and their use, refer to the *Content Server User Guide*.

Metadata Search Conjunctions

Each field on the page may have a search conjunction dropdown list on the left, depending on a setting on the Configure Records Management page (see the *Records Manager Setup Guide*). This enables you to use the Boolean logical operators AND and OR in your search criteria to expand or restrict the query.

Figure 13-3 Metadata fields with search conjunctions

The screenshot shows two search fields. The first field is labeled 'Title' and has a dropdown menu to its left with 'And' selected. The second field is labeled 'Type' and also has a dropdown menu to its left with 'And' selected. Both fields have a 'Substring' dropdown menu to their left and a text input box to their right.

Figure 13-4 Metadata fields without search conjunctions

The screenshot shows two search fields. The first field is labeled 'Title' and has a 'Substring' dropdown menu to its left and a text input box to its right. The second field is labeled 'Type' and has a 'Substring' dropdown menu to its left and a text input box to its right. There are no conjunction dropdowns present.

SEARCH RESULTS PAGE

The search results page lists all items in the system that meet the specified search criteria. It is displayed after you click **Search** on the [Basic Search Page](#) (page 13-2) or [Advanced Search Page](#) (page 13-4).



Note: In line with the Content Server and Records Manager security policies, you will always only see the physical items that you are entitled to see. If a physical item meet the search criteria but you do not have the appropriate rights to see it, then that item will not be included in the search results list.



Figure 13-5 Search results page

Found 2 potential items					
Freeze Results ▾ Labels ▾ Change View					
Delete Selected Items ▾ Edit ▾ Trigger Dates ▾ Request ▾ Content Basket					
<input type="checkbox"/> Select All	Name	Title	Date	Author	Actions
<input type="checkbox"/>	item2	PCM Item 2	3/21/07	sysadmin	
<input type="checkbox"/>	item1	PCM Item 1	3/21/07	sysadmin	

Page Features

The table below describes the various features of the search results page.

Feature	Description
Selection check boxes	These enable you to select one or more items in the list. To select all items, select the check box in the column header.
Name	This is the name of the physical item, as specified when the item was created.
Title	This is the title of the physical item, as specified when the item was created.
Date	This is the date that the physical item was submitted to the system.
Author	This is the name of the user who created the physical item.

Feature	Description
Actions menu icon ()	If you click on this icon, a popup menu is displayed that provides a number of options relevant to the specific content item. The available menu options depend on your assigned rights. For example, you may be able to view information about the content item, edit its attributes, manipulate the item, print an item label, or create links between items.
Info icon ()	If you click on this icon, the information page for the physical item is displayed (see page 12-11).

Menu Bars

Depending on your assigned rights, there may be two menu bars, one at the top of the page (with options that apply to all items in the search results list) and one in the table header (with options that apply to all selected items in the search results list). The available menu options depend on your assigned rights.

Page Menu Bar

This menu bar has the following options:

- ❖ **Freeze Results**—Choose this option to [freeze](#) all items in the search results list (see page 12-25). If you freeze an item, all disposition processing for that item is halted until you unfreeze the item again. You may need to freeze items in order to comply with legal or audit requirements (for example, as a result of litigation).
- ❖ **Labels**—This menu has a number of options that enable you to print [labels](#) (see chapter 9).
- ❖ **Change View**—This menu has two options that enable you to switch between page views (thumbnail view or headline view).

Table Menu Bar

- ❖ **Deleted Selected Items**—This option enables you to delete all selected items on the current search results page.
- ❖ **Edit**—This menu has two options that enables you to [freeze](#) (or unfreeze) all selected items in the search results list (see page 12-25). If you freeze an item, all disposition

processing for that item is halted until you unfreeze the item again. You may need to freeze items in order to comply with legal or audit requirements (for example, as a result of litigation).

- ❖ **Trigger Dates**—This menu enables you to set the current date for a number of actions on the physical items. See the *Records Manager System Maintenance Guide* for more information.
- ❖ **Request**—This menu has two options that enable you to make [reservation](#) requests for all items or the selected items on the search results page (see chapter 10).
- ❖ **Content Basket**—This menu has two options that enable you to add all items or the selected items on the search results page to your [content basket](#) (see chapter 15).

SCREENING FOR CONTENT AND RECORDS PAGE

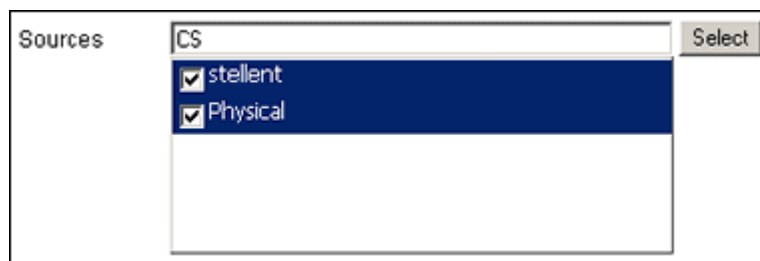
If you have the Admin.Screening right in Records Manager, you can also include physical items in the screening features of Records Manager.

If the Physical Content Manager application is installed, the Screen for Content and Records page in Records Manager includes a check box for physical content, which enables you to include or exclude physical content items in the screening results. Select the check box if you want physical items to be included in the screening results, and clear it if you want them to be excluded.

To access the Screen for Content and Records page in Records Manager, complete the following steps:

1. Log into the content server as a records administrator.
2. Open the **Administration** tray or top menu.
3. Click **Configure Records Management—Screening—Content and Records**.
4. Press the **Select** button for the Sources field.
5. Select the 'Physical' check box to include physical items in the screening operations.

Figure 13-6 Check box for physical content on Screen for Content and Records page in Records Manager



Note: There are check boxes for each content server on the computer. In addition, if there are more external data sources, each source will have its own check box.



Note: For more details on screening, refer to the *Records Manager System Maintenance Guide*.

CONTENT AND RECORDS SCREENING RESULTS PAGE

The Content and Records Screening Results page lists all items in the system that meet the specified search criteria. It is displayed after you click **Search** on the [Screening for Content and Records Page](#) (page 13-9).

Figure 13-7 Content and Records Screening Results page

Content and Records Screening Results for 'SCS4PCM'				
Name	Title	Date	Author	Actions
No results were found.				
Content and Records Screening Results for 'Physical'				
Name	Title	Date	Author	Actions
MicroUnit_001	Introductory Physics Text Microfilm	2/27/07	sysadmin	
PhysicalUnit_001	Physics Classroom Equipment	2/27/07	sysadmin	
AirportBox	Airport Storage Box	2/27/07	sysadmin	
Test1	The First one	2/26/07	sysadmin	

Each selected data source on the [Screening for Content and Records Page](#) (page 13-9) has its own section on the page, including the physical content items. The information

presented for the physical items is identical to the information on the [Search Results Page](#) (page 13-6).

BROWSING TO PHYSICAL CONTENT

Use this procedure to browse to physical items in the defined storage space hierarchy.



Note: You must have the PCM.PStorage.Read [right](#) to browse to physical content. By default, both predefined physical content management [roles](#) ('pcmrequestor' and 'pcmadmin') have this right.

To browse to physical items, complete the following steps:

1. Log into the content server.
2. Open the **Browse Content** tray or top menu.
3. Click **Browse Storage**.
4. You can now use the [storage location tree](#) and the [Exploring pages](#) (see pages 6-10 and 6-12, respectively) to drill down the storage space hierarchy and browse to the items contained in a storage location.



Note: You can also access the storage exploring pages from the [Configure Physical Content Management page](#) (page 5-2) (Configuration—Storage).

SEARCHING FOR PHYSICAL CONTENT

Use this procedure to search for physical items managed by the Physical Content Manager application.

To search for physical items, complete the following steps:



Note: You must have the PCM.Physical.Read [right](#) to search for physical content. By default, both predefined physical content management [roles](#) ('pcmrequestor' and 'pcmadmin') have this right.

To search for physical content, complete the following steps:

1. Log into the content server.
2. Open the **External Content** tray or top menu.
3. Click **Physical Content**.

The [Basic Search Page](#) (page 13-2) displayed.



Note: If you want to use the [Advanced Search Page](#) (page 13-4), choose **Search—Advanced Search** on the basic search page.

4. Specify the search criteria, and click on **Search** when you are done.

The [Search Results Page](#) (page 13-6) is displayed, which lists all items that meet your search criteria.

SCREENING FOR PHYSICAL CONTENT

Use this procedure to screen for physical items in Records Manager.



Note: You must have the Admin.Screening right in Records Manager to screen for physical content. By default, neither predefined Physical Content Manager role ('pcmrequestor' and 'pcmadmin') has this right. The predefined Records Manager role 'rmaadmin' does have the Admin.Screening right.

To screen for physical items, complete the following steps:

1. Log into the content server as a records administrator.
2. Open the **Administration** tray or top menu.
3. Click **Configure Records Management**.

The Configure Records Management page is displayed.

4. Click **Screening—Content and Records**.

The Screen for Content and Records page in Records Manager is displayed.

5. Make sure that you select the **Physical** check box under **Sources**. (This is not the default.)
6. Specify the search criteria, and click on **Search** when you are done.

The [Content and Records Screening Results page](#) (page 13-10) is displayed, which lists all items that meet your search criteria, including physical items.



Note: For more details on screening, refer to the *Records Manager System Maintenance Guide*.

Chapter
14

PROCESSING PHYSICAL CONTENT

OVERVIEW

This section explains how to process physical items by the Physical Content Manager application. It covers the following topics:

- ❖ [Retention Schedules for Physical Items](#) (page 14-1)
- ❖ [Disposition Events for Physical Items](#) (page 14-2)
- ❖ [Retention Assignments for Physical Items](#) (page 14-3)
- ❖ [Audit Log Files for Processed Events](#) (page 14-4)
- ❖ [Viewing Physical Items Due For Review](#) (page 14-5)
- ❖ [Approving Disposition Events for Physical Items](#) (page 14-5)
- ❖ [Completing Disposition Events for Physical Items](#) (page 14-6)

RETENTION SCHEDULES FOR PHYSICAL ITEMS

Like records, physical items can be assigned retention schedules, which define their life cycle. When creating a physical item, either as a [record](#) or [non-record content](#), you can assign a retention schedule to it. This links the physical item to a set of retention and disposition rules, which specify how long an item should be stored and when and how it should be disposed of.



Note: The same retention schedules and disposition rules may be used for physical items as for electronic records, but you may also define disposition rules specifically for physical items.



Note: For more information about retention and disposition rules, refer to the *Records Manager System Maintenance Guide*.

DISPOSITION EVENTS FOR PHYSICAL ITEMS

A disposition event is any action that needs to be performed on an item as part of its retention schedule (for example, after the retention period of the item has ended). Disposition events for physical items consist of three steps:

1. [Approving the event](#) (see page 14-5)
2. Performing the action(s) associated with the event—for example, physical destruction of the affected item(s).
3. [Marking the event as completed](#) (see page 14-6)



Note: The Destroy disposition event requires two steps for physical items, but not for electronic items. This is because the application can destroy electronic items for you, but it cannot do so for physical items. Destruction of physical items requires human intervention.

Disposition Actions for Physical Items

Physical items can be assigned the same disposition actions as electronic items. For an in-depth discussion of the available disposition actions, refer to the *Records Manager System Maintenance Guide*.

However, due to the nature of physical items, some of the available disposition actions are less relevant than they are for electronic items:

- ❖ Disposition actions related to revisions (since physical items cannot be revisioned):
 - Deleting old revisions
 - Checking in new revisions
 - Deleting previous revisions
 - Deleting revisions
 - Deleting all revision

- ❖ Disposition actions that involve digital data:
 - Scrubbing data (i.e., overwriting it multiple times to prevent recovery) as part of the destruction process.

If any of these disposition actions are assigned to physical items and they are due for completion, nothing specific needs to be done and they can be [marked completed](#) immediately.



Note: For an in-depth discussion of setting up and working with disposition events and actions, refer to the *Records Manager System Maintenance Guide*.

RETENTION ASSIGNMENTS FOR PHYSICAL ITEMS

Any pending events for physical items are included on the **My Approval List** page. To access this page, open the **My Content Server** tray or top menu and choose **My Retention Assignments**. This page is a receptacle for all items that generated notifications, both for electronic and physical items. It conveniently organizes the affected items in pages for you to peruse. The pages list all items that need to be reviewed, as well as all pending events that need to be approved or completed.

Items Due For Review

You can see a list of all physical items that are due for review by choosing the following menu options on the My Approval List page:

- ❖ **Items that you should review:** Pending Review—My Content and Records.
- ❖ **Items that others should review:** Pending Review—Other Content and Records.

Events Due For Approval

You can see a list of all disposition actions for physical items that need to be approved by choosing the following menu options on the My Approval List page:

- ❖ **Events that you should approve:** Pending Approval—My Dispositons.
- ❖ **Events that others should approve:** Pending Approval—Other Dispositons.

Events Due For Completion

You can see a list of all disposition actions for physical items that need to be completed by choosing the following menu options on the My Approval List page:

- ❖ **Events that you should complete:** Pending Completion—My Completed Physical Items.
- ❖ **Events that others should complete:** Pending Completion—Other Completed Physical Items.



Note: For more information on processing retention assignments, refer to the *Records Manager System Maintenance Guide*.

AUDIT LOG FILES FOR PROCESSED EVENTS

When a disposition event for physical items is completed, an audit log file is created automatically behind the scenes and, if possible, checked into the content server using the default metadata for audit logs. These checked-in log files can be used for audit trail purposes or as a verification tool.

You can use the Search Audit Trail page in Records Manager to search for disposition event that were processed for physical items (by setting the Source field to 'Physical').

Figure 14-1 Source field on Search Audit Trail page

Name	Substring	<input type="text"/>
Source	Substring	Physical
Details	Substring	<input type="text"/>
Comments	Substring	<input type="text"/>



Note: You need to have the Admin.Audit right in Records Manager to search the audit trail.



Note: For more information on the audit trail, refer to the *Records Manager System Maintenance Guide*.

VIEWING PHYSICAL ITEMS DUE FOR REVIEW

To see all items (electronic and physical) that are due for review, complete the following steps:

1. Open the **My Content Server** tray or top menu.
2. Choose the **My Retention Assignments** option.

The My Approval List page is displayed.

3. If you want to see all items that you yourself are assigned to review, choose **Pending Review—My Content and Records**.

If you want to see all items that others are assigned to review, choose **Pending Review—Other Content and Records**.

You can also click the appropriate e-mail notification link to directly access the My Approval List page, which lists all items that are due for review.

You can now proceed to review the physical items, and [mark them as reviewed](#) (see page 12-30).

APPROVING DISPOSITION EVENTS FOR PHYSICAL ITEMS

The first step of processing a disposition event for physical items is approving the event. To approve an event action, complete the following steps:


1. Open the **My Content Server** tray or top menu.
2. Choose the **My Retention Assignments** option.

The My Approval List page is displayed.

3. If you are approving an event action assigned to yourself, choose **Pending Approval—My Dispositons**.

If you are approving an event action assigned to someone else, choose **Pending Approval—Other Dispositons**.

You can also click the appropriate e-mail notification link to directly access the My Approval List page, which lists all items that are pending approval.

4. In the Actions icon popup menu () for the event action that you want to approve, click the **Approve [Action_Name]** command. This approves the event action and moves it to the completion list for further processing.



Note: If the event action does not move to the completion list, then all affected items are frozen and cannot be processed. If the event action does move but also remains in the approval list, then some of the affected items are frozen. The frozen items will not be processed until they are unfrozen.

You can now perform the actions associated with the disposition event (for example, physical destroying the items).



COMPLETING DISPOSITION EVENTS FOR PHYSICAL ITEMS

After approving a disposition event for physical items and performing the actions associated with it, you need to mark the event as completed. To do this, complete the following steps:

1. Open the **My Content Server** tray or top menu.
2. Choose the **My Retention Assignments** option.
The My Approval List page is displayed.
3. If you are completing an event action assigned to yourself, choose **Pending Completion—My Completed Physical Items**.

If you are completing an event action assigned to someone else, choose **Pending Completion—Other Completed Physical Items**.

You can also click the appropriate e-mail notification link to directly access the My Approval List page, which lists all items that are pending approval.

4. In the Actions icon popup menu () for the item you want to process, click the **Get Content, Records and Folders** command.
5. In the Actions icon popup menu () for the event action that you want to complete, click the **Complete [Action_Name]** command. This marks the event action as completed, and deletes it from the completion list.



Note: All completed disposition actions are included in the audit trail.

Chapter 15

WORKING WITH THE CONTENT BASKET

OVERVIEW

This section explains how to use the content basket to work with multiple items at once. It covers the following topics:

Concepts

- ❖ [About the Content Basket](#) (page 15-2)
- ❖ [Items in the Content Basket](#) (page 15-2)

Interface

- ❖ [Content Basket Page](#) (page 15-8)

Tasks

- ❖ [Viewing the Contents of the Content Basket](#) (page 15-10)
- ❖ [Adding Items to the Content Basket](#) (page 15-11)
- ❖ [Removing Items From the Content Basket](#) (page 15-11)
- ❖ [Sorting Items in the Content Basket](#) (page 15-13)
- ❖ [Making Reservation Requests for Items in the Content Basket](#) (page 15-13)
- ❖ [Downloading Items in the Content Basket](#) (page 15-14)

- ❖ [Creating E-Mail Links to Items in the Content Basket](#) (page 15-16)
- ❖ [Checking In Information About Items in the Content Basket](#) (page 15-17)

ABOUT THE CONTENT BASKET

The [content basket](#) in Physical Content Manager serves as a personal storage space for users where they can temporarily store multiple items for later processing. For example, if users want to [reserve](#) physical items for check-out, they search for all items that they want to reserve, and add each of them to their content basket. After adding all items, they can [open](#) their content basket and [make a reservation request](#) for the items in the basket.

Depending on the system setup and a user's assigned rights, the content basket can be used to do any the following:

- ❖ [Make reservation requests for one or more physical items](#) (see page 15-13)
- ❖ [Download a zip file with one of more items](#) (see page 15-14)
- ❖ [Create e-mail messages with links to one or more items](#) (see page 15-16)
- ❖ [Check in a PDF file with information about one or more items](#) (see page 15-17)

ITEMS IN THE CONTENT BASKET

The [content basket](#) can contain any number of items managed by Content Server, Records Manager, Physical Content Manager, or other add-ons.

Items—both internal and external, both records and non-records—can be added to the content basket from their information page or any search results page via options in the Actions dropdown menu on these pages. For an electronic (internal) item, you can specify whether the native file and/or the web-viewable rendition of the item should be added to the content basket. Multiple renditions and/or revisions of the same item may simultaneously exist in the content basket.











Tech Tip: A personalization table within Content Server is used to store the contents of each user's basket, so the state of the content basket persists across browser sessions without the use of cookies.

The following topics are important with regard to items in the content basket:

- ❖ [Item Thumbnails](#) (page 15-3)
- ❖ [Item Information](#) (page 15-4)
- ❖ [Renditions](#) (page 15-5)
- ❖ [Display Order](#) (page 15-6)

Item Thumbnails

Every item in the [content basket](#) has a thumbnail icon which identifies its type:

Item Type	Thumbnail
Internal item managed by Content Server	Icon associated with the item's specified content type
Internal item managed by Records Manager	Icon associated with the item's specified content type
External item managed by Physical Content Manager of object type "Box"	
External item managed by Physical Content Manager of object type "Document"	
External item managed by Physical Content Manager of object type "Folder"	
External item managed by Physical Content Manager of object type "Micro"	
External item managed by Physical Content Manager of object type "Optical"	
External item managed by Physical Content Manager of object type "Tape"	
External item managed by Physical Content Manager with no object type assigned	
All other items	

Item Information

The information provided for an item in the [content basket](#) depends on the type of item:

- ❖ [Internal \(Electronic\) Items](#)
- ❖ [External \(Physical\) Items](#)
- ❖ [Unavailable Items](#)

Internal (Electronic) Items

The information provided for internal (electronic) items managed by Content Server or Records Manager is:

- Item title (in bold)
- Native file name
- Content ID
- Revision number

Figure 15-1 Information for internal (electronic) item in content basket

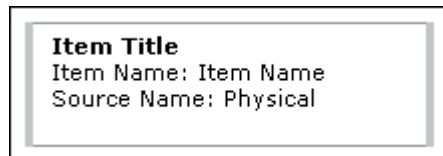


External (Physical) Items

The information provided for external (physical) items managed by Physical Content Manager is:

- Item title (in bold)
- Item name
- Source name (for external items managed by Physical Content Manager, this will always be “Physical”)

Figure 15-2 Information for external (physical) item in content basket



Unavailable Items

Items remain in the content basket until they are removed from it. If the status of an item changes, the content basket is not automatically updated to reflect this change. This means that items may become unavailable since they were initially added to the content basket. For example, they may be deleted or they may be assigned to a different security group to which a user has no access. If an item has become unavailable, this is indicated in the content basket.

Figure 15-3 Unavailable item in content basket



Note: You can use the **Remove All Unavailable Items** option in the **Basket** menu at the top of the page to remove all items from the content basket that have become unavailable since you added them to the basket.

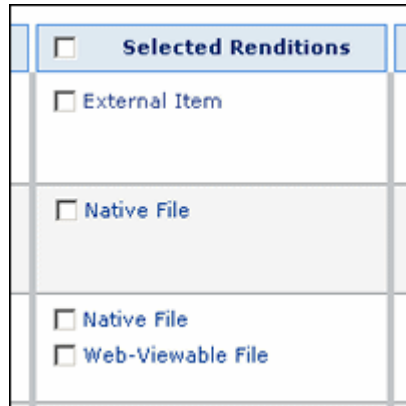
Renditions

An item can have more than one rendition. Electronic items have a native (i.e., original) file, and may also have one or more alternative renditions (typically, a web-viewable file, which can be viewed in a web browser). When adding an electronic item to the [content basket](#), you select a specific rendition to be added (for example, native or web-viewable). You may choose to add all available renditions of an item to the content basket, but you do not need to.

An external, physical item does not have renditions as there is no file associated with it (only metadata information).

The [content basket](#) shows what renditions of an item are included (see Figure 15-4). Each of the renditions can be selected separately. If the item is electronic, the rendition name is a hyperlink that opens the associated rendition of the item. The “rendition” for physical items is called “External Item,” which is not hyperlinked as there is no electronic version of the item to open.

Figure 15-4 Renditions of items in the content basket



<input type="checkbox"/> Selected Renditions
<input type="checkbox"/> External Item
<input type="checkbox"/> Native File
<input type="checkbox"/> Native File <input type="checkbox"/> Web-Viewable File



Note: To select all renditions of all items in the content basket, select the check box in the heading of the Select Renditions column.

Display Order

The standard display order for items in the [content basket](#) is the order in which they were added. Any new items are added to the bottom of the list. If you are adding multiple items at the same time (from a search results page), then the items are added in the order in which they were displayed on the search results page.

The Order Priority column for the [content basket](#) shows numbers that reflect the display order of the item in the basket. The lower the number, the higher the item is on the list ('1' is at the very top of the list).

Figure 15-5 Sort order in content basket



Order Priority
1
2
3
4

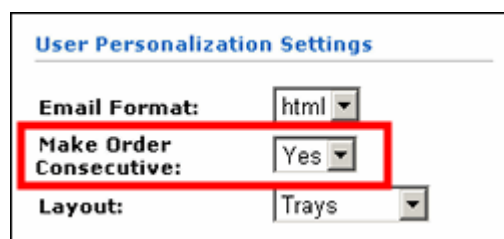
Initially, the order priority numbers are consecutive: 1, 2, 3, 4, etc. If you want to move an item to a different spot in the list, you can change its number and choose **Sort Basket** in the **Basket** menu at the top of the page. The list is then re-ordered according to the new number sequence (from low to high). If you change the number of an item to a number that is already in the list, then the item with the modified number is moved to immediately above the item with the existing number. If you want to move an item to the top of the list, change its number to '1'. If you want to move it to the bottom of the list, give it a sufficiently high number (for example, '9999').

Consecutive Number Sequence

When you delete items from the content basket or change their numbers to modify the display order, you may end up with a number sequence that is no longer consecutive. In other words, there may be missing or duplicate numbers in the sequence. You can make the number sequence fully consecutive again (without any gaps) by choosing **Make Sort Order Consecutive** in the **Basket** menu at the top of the page. This does not re-order the items in the list, but merely resets the number sequence to be consecutive ("1, 2, 3, 4" rather than, say, "1, 3, 4, 8.").

If you want the number sequence to be made consecutive automatically every time you update the display order, you can set the Make Order Consecutive option on your user profile page to 'Yes' (this is not the default). The Actions dropdown menu for the content basket will then no longer have the Make Sort Order Consecutive option as this is done automatically with every display order update.

Figure 15-6 Make Order Consecutive option on user profile page



The image shows a screenshot of the 'User Personalization Settings' page. The settings are as follows:

User Personalization Settings	
Email Format:	html
Make Order Consecutive:	Yes
Layout:	Trays

The 'Make Order Consecutive' setting is highlighted with a red rectangular box.

CONTENT BASKET PAGE

The Content Basket page shows all items that are currently in your own content basket. To access this page, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

Figure 15-7 Content Basket page

Thumbnail	Description	Selected Renditions	Order Priority	Info
	PCM Item 2 Item Name: Rem2 Source Name: Physical	<input type="checkbox"/> External Item	1	
	PCM Item 1 Item Name: Rem1 Source Name: Physical	<input type="checkbox"/> External Item	2	




Note: You can only view your own content basket (unless, of course, you log in as someone else).

Page Features

The table below describes the various features of the Content Basket page.

Feature	Description
Thumbnail	This column shows a thumbnail image that represents the type of item. For more information, see Item Thumbnails (page 15-3).
Description	This column provides information about the item in the content basket. For more information, see Item Information (page 15-4).

Feature	Description
Selected Renditions	<p>This column shows all renditions for an item. For physical (external) items, this will always be “External Item.” For electronic (internal) items, it will be the selected rendition (for example, “Native File” and/or “Web-Viewable File”).</p> <p>You can use the check boxes to select the rendition(s) that an operation should be performed on. If you select the select box in the column heading, all renditions currently in the content basket are selected.</p> <p>For more information, see Renditions (page 15-5).</p>
Order Priority	<p>When you open the Content Basket page, this column shows a number sequence that reflects the display order of the items. You can modify the numbers to change the display order.</p> <p>For more information, see Display Order (page 15-6).</p>
Info icon ()	<p>If you click this icon for an item, its information page is displayed (see page 12-11).</p>

Menu Bar

The Content Basket page includes a menu bar at top of the page. Depending on the system setup and a user’s assigned rights, this menu may include the following options:

- ❖ **Basket**—This menu has the following options:
 - **Sort Basket**—Choose this option to [sort the items in the content basket](#) (see page 15-13).
 - **Make Sort Order Consecutive**—Choose this option to [sort the items in the content basket by their order priority](#) (see page 15-13). This option is available only if you did not [set the sort order to be made consecutive automatically](#) with every update (see page 15-7).
 - **Remove All Items**—Choose this option to [remove all items](#) from the content basket (see page 15-11).
 - **Remove Selected Items**—Choose this option to [remove the selected items](#) from the content basket (see page 15-11).

- **Remove All Unavailable Items**—Choose this option to [remove all items](#) in the content basket that are no longer available (see page 15-11).
- ❖ **Download**—This menu has the following options:
 - **Download Selected Items**—Choose this option to [download a zip file](#) with the selected items in the content basket (see page 15-14). This option is available only if the Zip Rendition Management option was selected during installation of the Physical Content Manager software.
 - **Download All Items**—Choose this option to [download a zip file](#) with all items in the content basket (see page 15-14). This option is available only if the Zip Rendition Management option was selected during installation of the Physical Content Manager software.
- ❖ **Request**—This menu has the following options:
 - **Request Selected Items**—Choose this option to [make a reservation request](#) for the selected items in the content basket (see page 15-13).
 - **Request All Items**—Choose this option to [make a reservation request](#) for all items in the content basket (see page 15-13).
- ❖ **Email Links**—This menu has the following options:
 - **E-Mail Links to Selected Items**—Choose this option to [create an e-mail message](#) in your default e-mail application with links to the selected items in the content basket (see page 15-16).
 - **E-Mail Links to All Items**—Choose this option to [create an e-mail message](#) in your default e-mail application with links to all items in the content basket (see page 15-16).
- ❖ **Check In as PDF File**—Choose this option to [generate a PDF file](#) with information about all items in the content basket and check it into the content server (see page 15-17).

VIEWING THE CONTENTS OF THE CONTENT BASKET

Use this procedure to view the items that are currently in your content basket.

To view your content basket, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.

3. Click **My Content Basket**.

The [Content Basket page](#) (page 15-8) is displayed.

ADDING ITEMS TO THE CONTENT BASKET

Use this procedure to add items to your content basket:

1. Log into the content server.
2. [Search](#) for the item(s) that you want to add to the content basket (see page 13-2).
3. On the search results page, select the check box of each item that you want to add to your content basket.
4. Click **Content Basket** in the menu bar at the top of the page, and choose any of the following options depending on what you want to add to the content basket:
 - **Add Selected Items to Basket - Native**
 - **Add Selected Items to Basket - Web**
 - **Add All Items to Basket - Native**
 - **Add All Items to Basket - Web**



Note: The “All Items” options add all items *on the current page* to the content basket, which may not be all items in the complete search results. If you want to add all items in the complete search results list, you need to add them per page.

The [Content Basket page](#) (page 15-8) is displayed, with the new item(s) added at the bottom of the list.

REMOVING ITEMS FROM THE CONTENT BASKET

Use this procedure to remove items from your content basket. When you remove items, they are only removed from the content basket; they are not deleted from the system altogether.

Removing Individual Items

To remove individual items from the content basket, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.

3. Click **My Content Basket**.

The [Content Basket page](#) (page 15-8) is displayed.

4. Select the check box of each item (rendition) that you want to remove from the content basket.
5. Click **Basket** in the menu bar at the top of the page, and choose **Remove Selected Items**.

The selected items are removed immediately (without any further prompts), and the [Content Basket page](#) (page 15-8) is refreshed to show the list without the deleted item(s).

Removing All Items

To remove all items from the content basket, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

The [Content Basket page](#) (page 15-8) is displayed.

4. Click **Basket** in the menu bar at the top of the page, and choose **Remove All Items**.

All items are removed immediately (without any further prompts), and the [Content Basket page](#) (page 15-8) is refreshed to show an empty basket.

Removing Unavailable Items

To remove all [unavailable items](#) from the content basket (see page 15-5), complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

The [Content Basket page](#) (page 15-8) is displayed.

4. Click **Basket** in the menu bar at the top of the page, and choose **Remove All Unavailable Items**.

The [unavailable items](#) are removed immediately (without any further prompts), and the [Content Basket page](#) (page 15-8) is refreshed to show the list without the unavailable item(s).

SORTING ITEMS IN THE CONTENT BASKET

Use this procedure to re-sort the items in your content basket. You can change the display order of the item by modifying the numbers in the Order Priority column.

To re-sort the items in the content basket, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

The [Content Basket page](#) (page 15-8) is displayed.

4. Modify the numbers in the Order Priority column to reflect the display order you want. See [Display Order](#) (page 15-6) for further details.
5. Click **Basket** in the menu bar at the top of the page, and choose **Sort Basket**.

The items in the content basket are re-ordered in the specified number sequence (from low to high).



Note: Optionally, you can also choose **Make Sort Order Consecutive** in the **Basket** menu to make the number sequence fully consecutive again without any gaps (“1, 2, 3, 4” rather than, say, “1, 3, 4, 8.”). If the Action dropdown menu does not have this option, consecutive sort order is set as the default on your user profile page.

MAKING RESERVATION REQUESTS FOR ITEMS IN THE CONTENT BASKET

Use this option to make a reservation request for one or more physical items in your content basket.



Note: You must have the PCM.Reservation.Create [right](#) to make a reservation request. By default, this right is assigned to the predefined ‘pcmrequestor’ and ‘pcmadmin’ roles.



Note: You can only make reservation requests for physical items. Error messages will be displayed if you attempt to reserve electronic items.



Note: For more information about reservations, refer to [Chapter 10 \(Working With Reservations\)](#).

To make a reservation request for items in the content basket, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

The [Content Basket page](#) (page 15-8) is displayed.



Note: If your content basket does not contain the item(s) that you want to reserved, [add](#) them first (see page 15-11).

4. Select the check box of each physical item that you want to reserve, and choose **Request Selected Items** from the **Request** menu at the top of the page. If you want to reserve all items in your content basket, you can also choose **Request All Items**.

A prompt is displayed asking you whether the selected items should be removed from the content basket after they are reserved.

5. Click **Yes** or **No** according to your preference. If you click **Cancel**, the reservation request is cancelled.

The [Create Request page](#) (see page 10-13) is displayed.

6. Specify the properties of the new reservation request, such as the transfer method, priority, and delivery location.
7. Click **Create** when you are done.

The items are now reserved, and the system administrator is notified of your reservation request. After the administrator processes the reservation request, it can be fulfilled in accordance with the procedures in your organization. If a reserved item is already checked out, you are placed on a waiting list for that item.

DOWNLOADING ITEMS IN THE CONTENT BASKET

Use this procedure to download a zip file with one or more items in your content basket.



Note: This feature is available only if the Zip Rendition Management option was selected during installation of the Physical Content Manager software.

To create the zip file, complete the following steps:

1. Log into the content server.

2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

The [Content Basket page](#) (page 15-8) is displayed.



Note: If your content basket does not contain the item(s) that you want to download, [add](#) them first (see page 15-11).

4. Select the check box of each item that you want to download, and choose **Download Selected Items** from the **Download** menu at the top of the page. If you want to include all items in the zip file, you can also choose **Download All Items**.

A zip file called “Bundle.zip” is created, and a dialog is displayed where you can open or save the file.

Contents of Zip File

What is included in the zip file for an item depends on the type of that item:

- ❖ [Internal \(Electronic\) Items](#)
- ❖ [External \(Physical\) Items](#)

Internal (Electronic) Items

The zip file contains the selected rendition file for the item. The file name for the item is built up as follows:

<Item_Title> (Primary|Web) [<Content_ID> Revision-<Rev. No.>].<File_Extension>

where “Primary” refers to the native file rendition, and “Web” to the web-viewable rendition. For example: *Report2005 (Primary) [CS12025 Revision-2].doc*.

External (Physical) Items

The zip file contains a file with the metadata, location, and retention information about the physical item, in the archive metadata format as specified on the Configure Records Management page. (See the *Records Manager Setup Guide* for details.) The file name is built up as follows:

<Random_Number>] (External Item) [<Item_Name>].<File_Extension>

where the file extension depends on the configured format setting. For example: *810871584 (External Item) [Contracts2005].hda*.

CREATING E-MAIL LINKS TO ITEMS IN THE CONTENT BASKET

Use this procedure to create a new e-mail message in your default e-mail client, with information and links for one or more items in your content basket.

To create the e-mail, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

The [Content Basket page](#) (page 15-8) is displayed.



Note: If your content basket does not contain the item(s) that you want to include in the e-mail message, [add](#) them first (see page 15-11).

4. Select the check box of each item (rendition) that you want to include in the e-mail message, and choose **E-Mail Links to Selected Items** from the **Email Links** menu at the top of the page. If you want to include all items in the e-mail message, you can also choose **E-Mail Links to All Items**.

A new e-mail message window for your default e-mail client is displayed, with “Content Item Rendition Links” as the subject line and links and information for the items in the message body.



Note: Some e-mail clients have limitations with regard to the number of characters used in the body of a message. Adding a large number of items as links to an e-mail may exceed the limitation, resulting in some links not being listed.

Contents of E-Mail Message

What is included in the e-mail message for an item depends on the type of that item:

- ❖ [Internal \(Electronic\) Items](#)
- ❖ [External \(Physical\) Items](#)

Internal (Electronic) Items

The e-mail message contains the content ID and title of each selected item, as well as hyperlinks to the selected rendition file(s) for the item.

External (Physical) Items

The e-mail message contains the name and title of each selected physical item, as well as a hyperlink to the item's information page.

CHECKING IN INFORMATION ABOUT ITEMS IN THE CONTENT BASKET

Use this procedure to generate a PDF file with information about one or more items in the content basket and check it into the content server.



Note: The generated PDF file cannot be viewed using Adobe Acrobat 5.x or earlier. You need at least version 6.0 of the Acrobat software.

To generate the PDF file, complete the following steps:

1. Log into the content server.
2. Open the **My Content Server** tray or top menu.
3. Click **My Content Basket**.

The [Content Basket page](#) (page 15-8) is displayed.



Note: If your content basket does not contain the item(s) that you want to include in the PDF file, [add](#) them first (see page 15-11).

4. Select the check box of each item (rendition) that you want to include in the PDF file, and choose **Check in as PDF File** from the menu at the top of the page.

A PDF file is generated, and the content check-in page is displayed. Please note that you do not need to specify a primary file (this is the newly created PDF file).

5. Specify the metadata as required, and click **Check In** to submit the file to the content server.



Note: The file name is the specified content ID, so if you specify "Report1" as the content ID, then the file name will be *Report1.pdf*.



Note: For more information about checking files into the content server, refer to the *Content Server User Guide*. For more information about checking in records, refer to the *Records Manager User Guide*.

Contents of PDF File

The PDF file contains one page for each item included, plus one final page with empty boxes for author, reviewer, and approver signatures. The following information is included for each item:

- ❖ **Title**
- ❖ **File Name** (set to “undefined” for physical items)
- ❖ **Content ID** (set to the name for physical items)
- ❖ **Revision Label**



USING THE PRINT REPORT UTILITY

OVERVIEW

This section covers the following topics:

- ❖ [About the Print Report Utility](#) (page A-2)
- ❖ [Installing and Starting the Print Report Utility](#) (page A-3)
- ❖ [Format Files](#) (page A-4)
- ❖ [Print Report Utility Interface](#) (page A-5)
 - [Main Print Report Utility Screen](#) (page A-5)
 - [Design Labels Screen](#) (page A-7)
 - [Report Design Screen](#) (page A-11)
 - [Print Labels Screen](#) (page A-14)
 - [Print Report Screen](#) (page A-16)
 - [Print Options Screen](#) (page A-18)
 - [View Label Codes Screen](#) (page A-20)
 - [View Reports Screen](#) (page A-20)
 - [Report Preview Screen](#) (page A-21)
- ❖ [Working With the Print Report Utility](#) (page A-23)
 - [Printing Labels](#) (page A-23)
 - [Printing Reports](#) (page A-24)
 - [Modifying an Existing Label Format Definition](#) (page A-24)

- [Modifying an Existing Report Format Definition](#) (page A-25)
- [Generating Report Schema](#) (page A-25)
- [Generating Function Labels](#) (page A-26)



Note: If you are using Adobe Acrobat (PDF) as the report label format, then you probably have no need for the Print Report Utility.

ABOUT THE PRINT REPORT UTILITY

The optional Print Report Utility is a Windows application that enables you to view and print label data files (with PLB file extension) and report data files (with PRT file extension) generated by Physical Content Manager. The PLB and PRT files are XML-based, plain-text files that contain data for [user labels](#), [storage location labels](#), [labels for physical items](#), or reports.



Note: For more information about labels, refer to [Chapter 9 \(Working With Labels\)](#).

The layout and formatting of the labels and reports are controlled by [format files](#) (see page A-4), which are basically Crystal Reports definition files with the RPT file extension (for “report”). You can use any of the predefined label and report formats, or you can create your own using Crystal Reports.



Note: The Crystal Reports application is not provided with Physical Content Manager, and needs to be purchased separately. For more information, refer to www.crystalreports.com.

In addition to Physical Content Manager’s label and report format (as defined in [.RPT format files](#)), you can also use ColorBar labels (defined in [.DZN design files](#)).



Note: The label and report format is set on the [Configure Physical Content Manager page](#) (see page 5-2). The default is Adobe Acrobat (PDF), but you can change this to the PCM Report format, which creates PLB files (for labels) or PRT files (for reports).

INSTALLING AND STARTING THE PRINT REPORT UTILITY

The Print Report Utility software is provided with Physical Content Manager, but is not automatically installed with the Physical Content Manager software. You will need to install it manually after installing the PCM software.

The installer for the Print Report Utility is included on the Physical Content Manager software distribution media, and, after installation of the PCM software, is also located on the computer running PCM in the `[CS_Instance_Dir]/custom/PhysicalContentManager/Client` directory.



Important: You need the Microsoft .NET Framework Version 1.1 Redistributable Package to run the Print Report Utility. If you do not already have this on your computer, you can download it from the [Microsoft website](http://www.microsoft.com) (www.microsoft.com).

You do not need to install this utility on the same computer as Physical Content Manager. You can install it on any computer as long as it has access to the PLB or PRT files generated by Physical Content Manager.



Important: If you upgrade the Print Report Utility from an earlier version, you *must* uninstall the existing instance before installing the new release. If you do not, an error message is reported during the installation and you will not be able to proceed.

Installing the Software

To install the Print Report Utility, complete the following steps:

1. Locate the executable installer file, named *PrintReportUtility.exe*, which is stored in `[CS_Instance_Dir]\custom\PhysicalContentManager\Client\` or on the Physical Content Manager distribution media.
2. Double-click the executable file to start the installer.
3. Follow the instructions on screen to install the software. By default, the software is installed in `C:\Program Files\Oracle\Print Report Utility\`, but you can select a different directory for installation.

Preparing ColorBar

If you want to use the Print Report Utility in conjunction with ColorBar, you need to manually move the *extemlab.mdb* file from the Print Report Utility installation directory to your Colorbar directory.

In addition, you need to manually edit the *[PRU_Install_Dir]/bin/PrnRpt.ini* file so that the `CBPath` entry is the path to your Colorbar installation.

Starting the Software

After installing the Print Report Utility software, you can start it by clicking **Start—Programs—Oracle—Print Report Utility—Print Report Utility**. You can also double-click the utility icon on the Windows desktop.

FORMAT FILES

The label files (PLB) and report files (PRT) generated by Physical Content Manager contain only data and no layout or formatting information. This is handled by separate format files, which are basically Crystal Reports files with the RPT file extension (for “report”).

There are a number of predefined label and report format files, which are located in the *[Print_Report_UTILITY_Dir]\Reports* directory:

- ❖ **Invoice.rpt**—This report format is for [invoices](#) (see chapter 11)
- ❖ **Invoice_Data.rpt**—This report format is for [invoice data](#) (see chapter 11)
- ❖ **LBL_BOX.rpt**—This report format is for [labels for physical items](#) (see page 9-11) of [object type](#) “Box.”
- ❖ **LBL_DOCUMENT.rpt**—This report format is for [labels for physical items](#) (see page 9-11) of [object type](#) “Document.”
- ❖ **LBL_FOLDER.rpt**—This report format is for [labels for physical items](#) (see page 9-11) of [object type](#) “Folder.”
- ❖ **LBL_MICRO.rpt**—This report format is for [labels for physical items](#) (see page 9-11) of [object type](#) “Micro.”
- ❖ **LBL_OPTICAL.rpt**—This report format is for [labels for physical items](#) (see page 9-11) of [object type](#) “Optical.”
- ❖ **LBL_STORAGE.rpt**—This report format is for [storage location labels](#) (see page 9-8) that are on individual US Letter sheets (8.5 x 11”).
- ❖ **LBL_STORAGE_ROLL.rpt**—This report format is for [storage location labels](#) (see page 9-8) that are on a continuous roll of labels.
- ❖ **LBL_USER.rpt**—This report format is for [user labels](#) (see page 9-3).

- ❖ **PICKLIST.rpt**—This report format is used to create a list of all reserved physical items that need to be taken from their storage location for further processing and reservation fulfillment.
- ❖ **CKINOUT.rpt** (in the System subdirectory)—This report format is for [function labels](#) (see page A-26).



Tech Tip: You can use Crystal Reports to create your own label and report format files that can be used in conjunction with Physical Content Manager.



Important: If you associate a data file with an incompatible label or report format file (say, a data file for a user label with the format file for storage labels), then you may end up with blank (or otherwise malformed) labels or reports. This is because the format file contains references to data fields that may not be present in the data file.

PRINT REPORT UTILITY INTERFACE

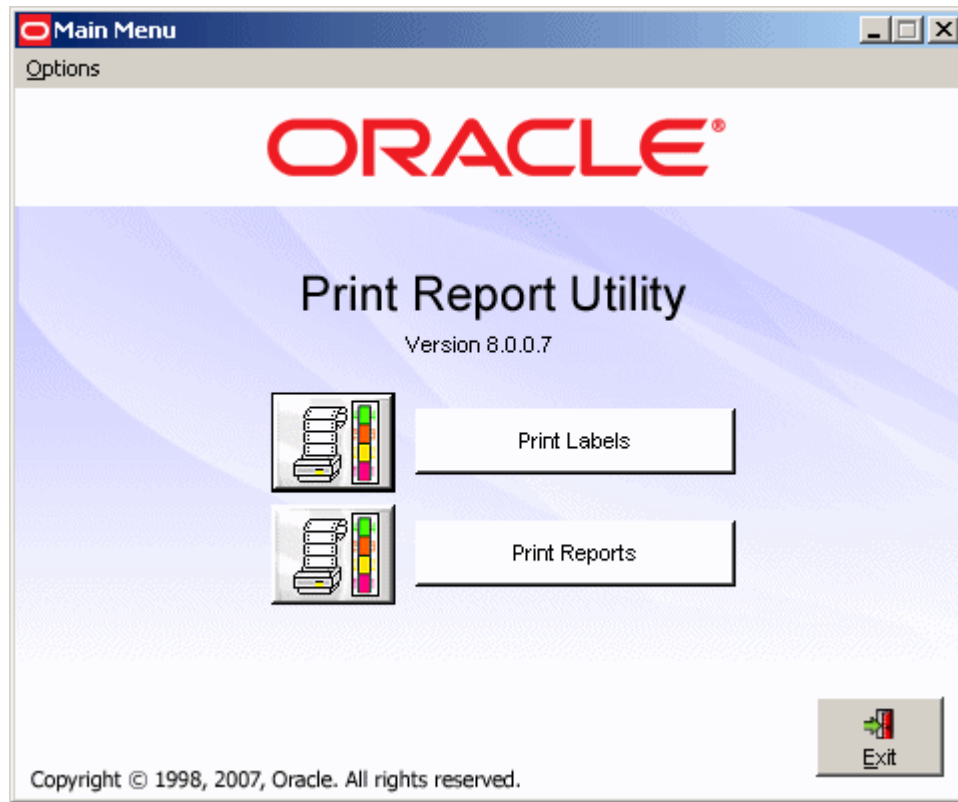
The Print Report Utility has the following user interface screens:

- ❖ [Main Print Report Utility Screen](#) (page A-5)
- ❖ [Design Labels Screen](#) (page A-7)
- ❖ [Print Labels Screen](#) (page A-14)
- ❖ [Print Options Screen](#) (page A-18)
- ❖ [View Label Codes Screen](#) (page A-20)
- ❖ [Report Preview Screen](#) (page A-21)

Main Print Report Utility Screen

After you [start](#) the Print Report Utility application, its main screen is displayed.

Figure A-1 Main Print Report Utility screen



The table below describes the various features of the main Print Report Utility screen.

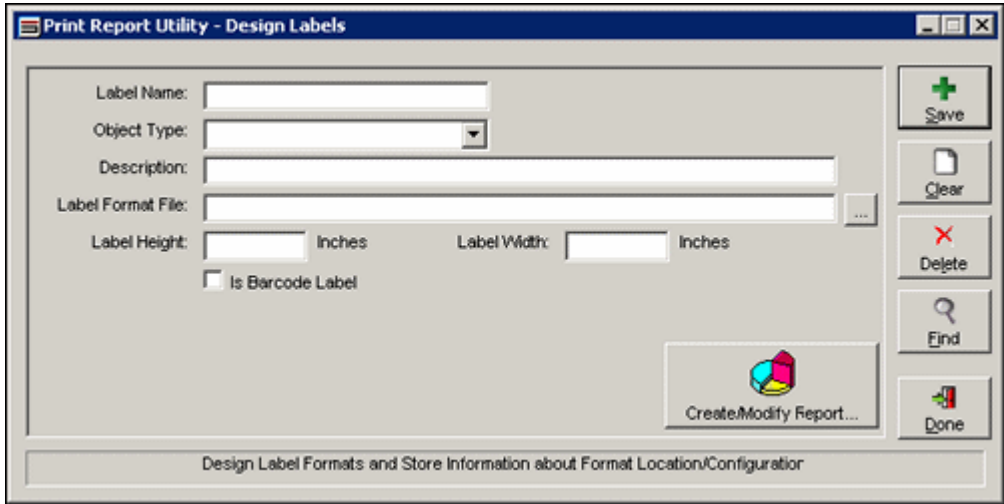
Feature	Description
Options menu	<p>This menu has three options:</p> <ul style="list-style-type: none"> ❖ Design > Labels—If you choose this option, the Design Labels screen is displayed (see page A-7). ❖ Design > Reports—If you choose this option, the Report Design screen is displayed (see page A-11). ❖ Generate Schema— Choose this option to generate an XML schema file for a report data file (see page A-25). This may be useful if you want to create your own label format files in Crystal Reports and you want to include your own custom PCM metadata fields (see page 5-79).

Feature	Description
Print Labels	If you click this button, the Print Labels Screen is displayed (see page A-14).
Print Reports	If you click this button, the Print Reports Screen is displayed (see page A-16).
Exit button	Click this button to close the Print Report Utility application.

Design Labels Screen


The Design Labels screen is used to manage label profiles, which are definition sets for the layout and formatting of labels generated by Physical Content Manager. To access this screen, choose **Options—Design—Labels**.




Figure A-2 Design Labels screen



The table below describes the various features of the Design Labels screen.

Feature	Description
Label Name	<p>Specify a label name, which is essentially a brief name for the label profile (i.e., the definition set on this screen). The label names help you manage the defined label profiles.</p> <p>If you know the label name of an existing profile and you want to see its current properties, you can enter it in the Label Name field and click the Find button. If there is indeed a label profile that has the specified label name, all its fields are filled automatically with their current values.</p>
Object Type	<p>Select the object type that the label contents consist of. The following object types are available:</p> <ul style="list-style-type: none"> ❖ BOX (for physical item labels) ❖ FOLDER (for physical item labels) ❖ DOCUMENT (for physical item labels) ❖ MICRO (for physical item labels) ❖ OPTICAL (for physical item labels) ❖ STORAGE (for storage location labels) ❖ USER (for user labels)
Description	<p>Provide a brief description for the label profile.</p> <ul style="list-style-type: none"> ❖ Maximum number of characters: 60.

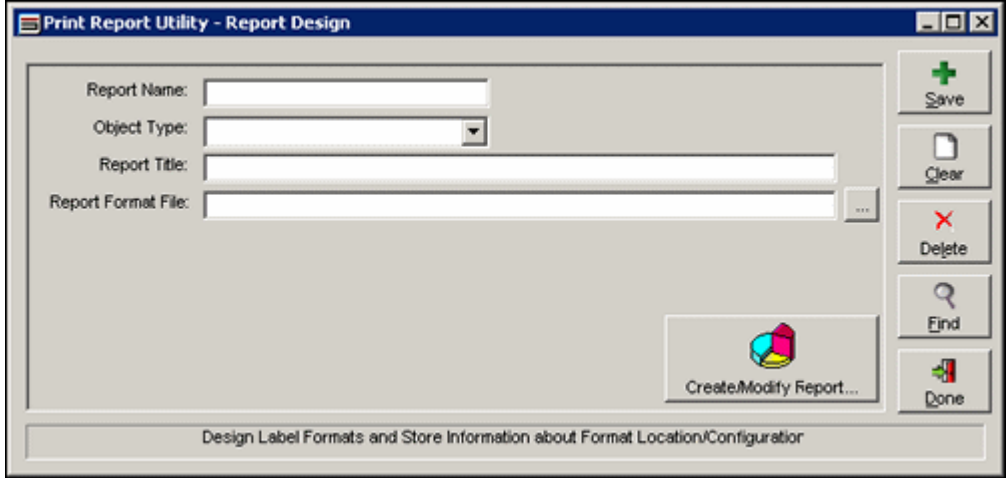
Feature	Description
Label Format File	<p>Use the file selection button next to this field to select the label format file (see page A-4) that should be used for the current label profile. Label format files are Crystal Reports files with the RPT file extension (for “report”).</p> <p> Note: Make sure that you select a format file that is compatible with the selected object type. For example, if you select the object type “BOX,” then select the <i>LBL_BOX.rpt</i> label format file. Otherwise you may end up with blank (or otherwise malformed) labels. This is because the label format file contains references to data fields that may not be present in the PLB data file.</p>
Label Height	Enter the height (in inches) of the label used in this profile. This is an optional field that is for informational purposes only to help you distinguish between the defined label profiles. The label height that is actually used is included in the label format file (with file extension RPT).
Label Width	Enter the width (in inches) of the label used in this profile. This is an optional field that is for informational purposes only to help you distinguish between the defined label profiles. The label width that is actually used is included in the label format file (with file extension RPT).
Is Barcode Label	Select this check box if the label includes a barcode. This is an optional field that is for informational purposes only to help you distinguish between the defined label profiles.
Save button	Click this button to save the current label profile. After you save a profile, it becomes available in the Label dropdown list on the Print Labels Screen (page A-14).

Feature	Description
Clear button	Click this button to empty all fields in this screen and return the screen to its initial blank state.
Delete button	<p>Click this button to delete the current label profile. If you delete a profile, it is no longer available in the Label dropdown list on the Print Labels Screen (page A-14).</p> <p> Note: The label format file associated with the label profile is <i>not</i> deleted.</p>
Find button	<p>Click this button to display the View Label Codes Screen (page A-20), which lists all currently available label definitions.</p> <p>If you know the label code of an existing profile and you want to see its current properties, you can enter it in the Label Code field and click the Find button. If there is indeed a label profile that has the specified label code, all its fields are filled automatically with their current values.</p> <p> Note: If the Label Code field is not empty and you want to see the View Label Codes Screen (page A-20), you need to clear that field before clicking the Find button.</p>
Create/Modify Report button	<p>Click this button to select an existing label format file (see page A-4), and modify it in Crystal Reports. An error message is displayed if the executable file of that application (crw32.exe) cannot be located on your computer.</p> <p> Note: The Crystal Reports software is not provided with Physical Content Manager and should be purchased separately.</p>
Done button	Click this button to close this screen and return to the main Print Report Utility screen (see page A-5).

Report Design Screen


The Report Design screen is used to manage report profiles, which are definition sets for the layout and formatting of reports generated by Physical Content Manager. To access this screen, choose **Options—Design—Reports**.




Figure A-3 Design Reports screen



The table below describes the various features of the Report Design screen.

Feature	Description
Report Name	Specify a report name, which is essentially a brief name for the report profile (i.e., the definition set on this screen). The report names help you manage the defined report profiles. If you know the report name of an existing profile and you want to see its current properties, you can enter it in the Report Name field and click the Find button. If there is indeed a report profile that has the specified report name, all its fields are filled automatically with their current values.

Feature	Description
Object Type	<p>Select the object type that the report contents consist of. The following object types are available:</p> <ul style="list-style-type: none"> ❖ BOX (for physical item labels) ❖ FOLDER (for physical item labels) ❖ DOCUMENT (for physical item labels) ❖ MICRO (for physical item labels) ❖ OPTICAL (for physical item labels) ❖ STORAGE (for storage location labels) ❖ USER (for user labels)
Report Title	<p>Provide a brief description for the report profile.</p> <ul style="list-style-type: none"> ❖ Maximum number of characters: 60.
Report Format File	<p>Use the file selection button next to this field to select the format file (see page A-4) that should be used for the current report profile. Format files are Crystal Reports files with the RPT file extension (for “report”).</p> <p> Note: Make sure that you select a format file that is compatible with the selected object type. For example, if you select the object type “BOX,” then select the <i>LBL_BOX.rpt</i> format file. Otherwise you may end up with blank (or otherwise malformed) reports. This is because the format file contains references to data fields that may not be present in the PRT data file.</p>
Save button	<p>Click this button to save the current report profile. After you save a profile, it becomes available in the Stored Report dropdown list on the Print Report Screen (page A-16).</p>
Clear button	<p>Click this button to empty all fields in this screen and return the screen to its initial blank state.</p>

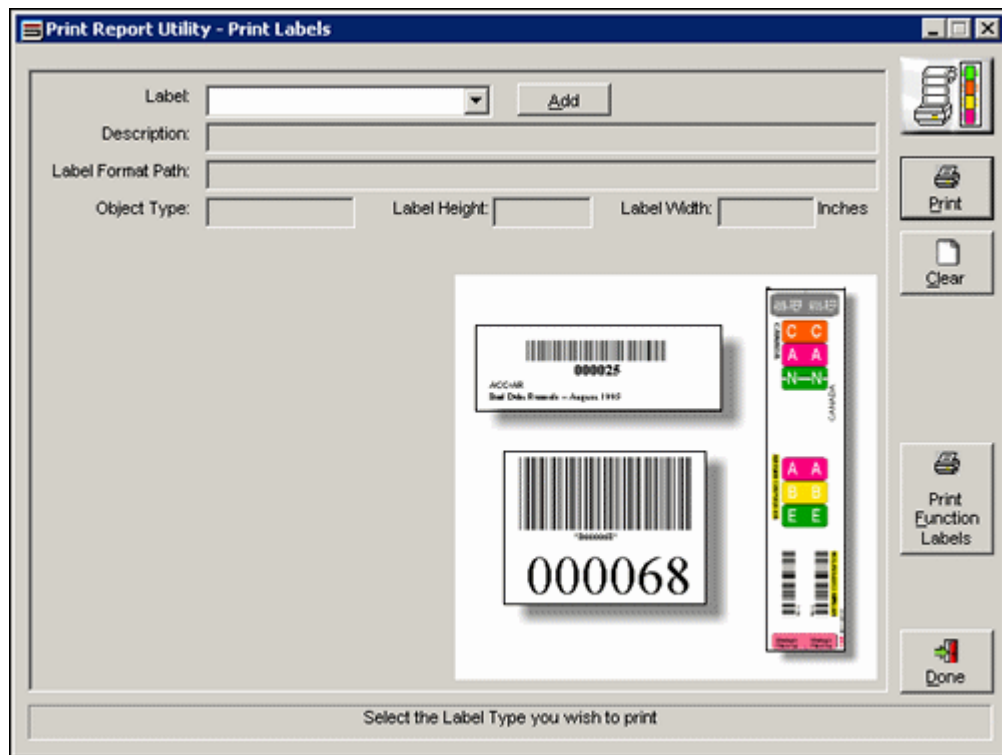
Feature	Description
Delete button	<p>Click this button to delete the current report profile. If you delete a profile, it is no longer available in the Stored Report dropdown list on the Print Report Screen (page A-16).</p> <p> Note: The format file associated with the report profile is <i>not</i> deleted.</p>
Find button	<p>If more than one report profile is defined, you can click this button to display the View Reports Screen (page A-20), which lists all currently available report definitions. If only one report profile is defined (which is the default) and you click the Find button, then all fields in this screen are filled automatically with that report's values (without displaying the View Reports Screen on page A-20 first).</p> <p>If you know the name of an existing profile and you want to see its current properties, you can enter it in the Report Name field and click the Find button. If there is indeed a label profile that has the specified label code, all its fields are filled automatically with their current values.</p> <p> Note: If the Report Name field is not empty and you want to see the View Reports Screen (page A-20), you need to clear that field before clicking the Find button.</p>
Create/Modify Report button	<p>Click this button to select an existing format file (see page A-4), and modify it in Crystal Reports. An error message is displayed if the executable file of that application (crw32.exe) cannot be located on your computer.</p> <p> Note: The Crystal Reports software is not provided with Physical Content Manager and should be purchased separately.</p>

Feature	Description
Done button	Click this button to close this screen and return to the main Print Report Utility screen (see page A-5).

Print Labels Screen


The Print Labels screen is used to create output of label data files based on a [label format file](#) (see page A-4). To access this page, click on the **Print Labels** button (or the image next to it) on the [main Print Report Utility screen](#) (see page A-5).


Figure A-4 Print Labels screen



Note: The Print Labels screen will look slightly differently if you select ColorBar as the label code.

The table below describes the various features of the Print Labels screen.

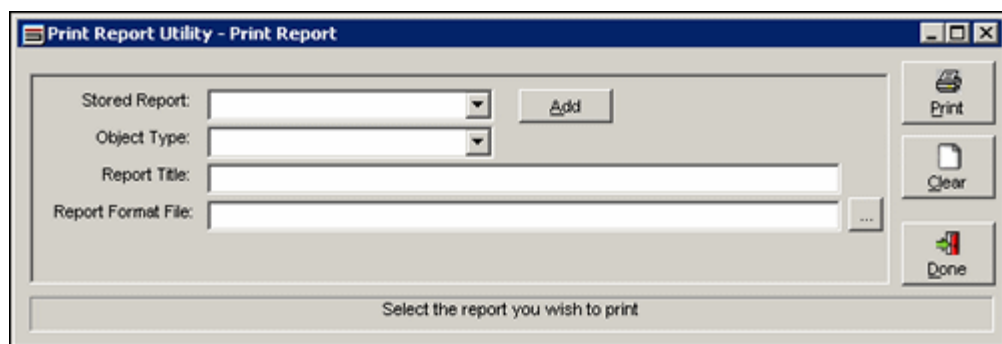
Feature	Description
Label	<p>Select the label profile to be used from the dropdown list. The list includes a number of predefined label formats, as well as any label profiles defined on the Design Labels Screen (page A-7).</p> <p>After you select a label profile, all other fields on this screen are automatically filled with the profile's current values. These fields cannot be edited and are for information purposes only. For additional information on the fields, refer to Design Labels Screen (page A-7).</p> <p> Note: If you select ColorBar as the label code, you are prompted to select the definition/design file and data file that should be used.</p>
Add button	Click this button to open the Design Labels Screen (page A-7) in order to create a new label profile and make it available in the Label dropdown list.
Description	This read-only field shows the description that was specified for the currently selected label profile.
Label Format Path	This read-only field shows the full path to the label format file (see page A-4) that is used for the currently selected label profile.
Object Type	This read-only field shows the object type that was specified for the currently selected label profile.
Label Height	This read-only field shows the label height that was specified for the currently selected label profile.
Label Width	This read-only field shows the label width that was specified for the currently selected label profile.

Feature	Description
Print button	Click this button to select a PLB file to be processed using the specified label profile. After you select the PLB file, the Print Options Screen (page A-18) is displayed.
Clear button	Click this button to empty all fields in this screen and return the screen to its initial blank state.
Print Function Labels button	Click this button to create a sheet with transfer barcodes for all available barcode actions (see page 8-3).  Note: You do not need to select a label before clicking this button.
Done button	Click this button to close this screen and return to the main Print Report Utility screen (see page A-5).

Print Report Screen


The Print Report screen is used to create output of report data files based on a [report format file](#) (see page A-4). To access this page, click on the **Print Reports** button (or the image next to it) on the [main Print Report Utility screen](#) (see page A-5).

Figure A-5 Print Report screen



The table below describes the various features of the Print Report screen.

Feature	Description
Stored Report	<p>Select the report profile to be used from the dropdown list. The list includes a number of predefined report formats, as well as any report profiles defined on the Report Design Screen (page A-11).</p> <p>After you select a report profile, all other fields on this screen are automatically filled with the profile's current values. These fields cannot be edited and are for information purposes only. For additional information on the fields, refer to Report Design Screen (page A-11).</p>
Add button	<p>Click this button to open the Report Design Screen (page A-11) in order to create a new report and make it available in the Stored Report dropdown list.</p>
Object Type	<p>Select the object type that the report contents consist of. The following object types are available:</p> <ul style="list-style-type: none"> ❖ BOX (for physical item labels) ❖ FOLDER (for physical item labels) ❖ DOCUMENT (for physical item labels) ❖ MICRO (for physical item labels) ❖ OPTICAL (for physical item labels) ❖ STORAGE (for storage location labels) ❖ USER (for user labels)

Feature	Description
Report Title	Provide a title for the report. ❖ Maximum number of characters: 60.
Report Format File	Use the file selection button next to this field to select the format file (see page A-4) that should be used for the current report. Format files are Crystal Reports files with the RPT file extension (for “report”).  Note: Make sure that you select a format file that is compatible with the selected object type. For example, if you select the object type “BOX,” then select the <i>LBL_BOX.rpt</i> format file. Otherwise you may end up with blank (or otherwise malformed) reports. This is because the format file contains references to data fields that may not be present in the PRT data file.
Print button	Click this button to select a PRT file to be processed using the specified report profile. After you select the PRT file, the Print Options Screen (page A-18) is displayed.
Clear button	Click this button to empty all fields in this screen and return the screen to its initial blank state.
Done button	Click this button to close this screen and return to the main Print Report Utility screen (see page A-5).

Print Options Screen

The Print Options screen enables you to set some options before outputting the selected label or report. To access this page, complete the following steps:

1. Click on the **Print Labels** or **Print Report** button (or the image next to it) on the [main Print Report Utility screen](#) (see page A-5).
The [Print Labels Screen](#) (page A-14) or [Print Report Screen](#) (page A-16) is displayed.
2. Select a **Label** or **Report** from the dropdown list.



Note: For more information about labels, refer to [Chapter 9 \(Working With Labels\)](#).

3. Click on the **Print** button.

A file selection dialog is displayed.

4. Navigate to the data file (with file extension PLB or PRT) that you want to print.
As soon as you close the file selection dialog, the Print Options screen is displayed.

Figure A-6 Print Options screen

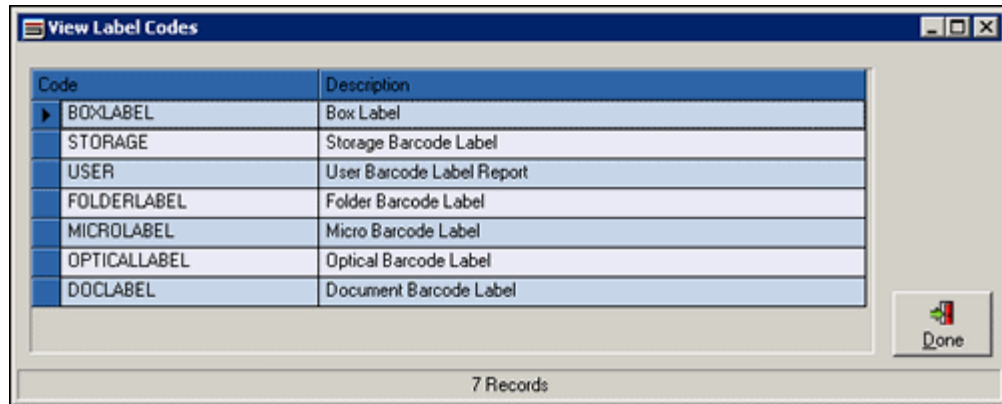
The table below describes the various features of the Print Options screen.

Feature	Description
Output Destination	This read-only field shows the full path to the format file (see page A-4) that will be used for the data file (PLB or PRT) to be processed.
Report Title	If required, you can specify a title for the report that will be generated. This title will be included in the generated report only if the format file to be used includes a reference to this field. (None of the predefined label format files include a title field.)
Printer	This read-only field shows “Screen -- Preview” to indicate that you will see a print preview when you click the OK button.
OK button	Click this button to open the Report Preview Screen (page A-21), where you can see what the generated report looks like before processing it further.
Cancel button	Click this button to close the Print Options screen without printing anything, and return to the Print Labels Screen (page A-14) or Print Report Screen (page A-16).

View Label Codes Screen

Use the View Label Codes screen to view all label profiles that are currently defined. To access this screen, click the **Find** button on the [Design Labels Screen](#) (page A-7) with nothing specified in the Label Code field.

Figure A-7 View Label Codes screen

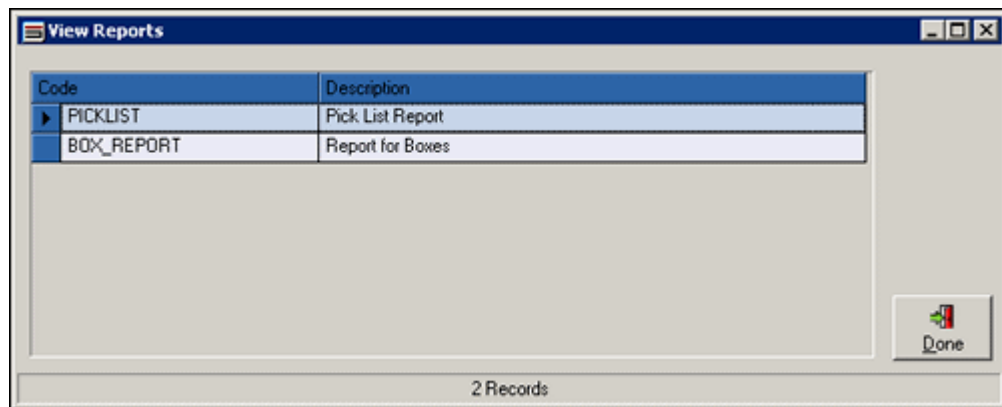


To open a label profile in the [Design Labels Screen](#) (page A-7), double-click its line.

View Reports Screen

Use the View Reports screen to view all report profiles that are currently defined. To access this screen, click the **Find** button on the [Report Design Screen](#) (page A-11) with nothing specified in the Report Name field.

Figure A-8 View Reports screen



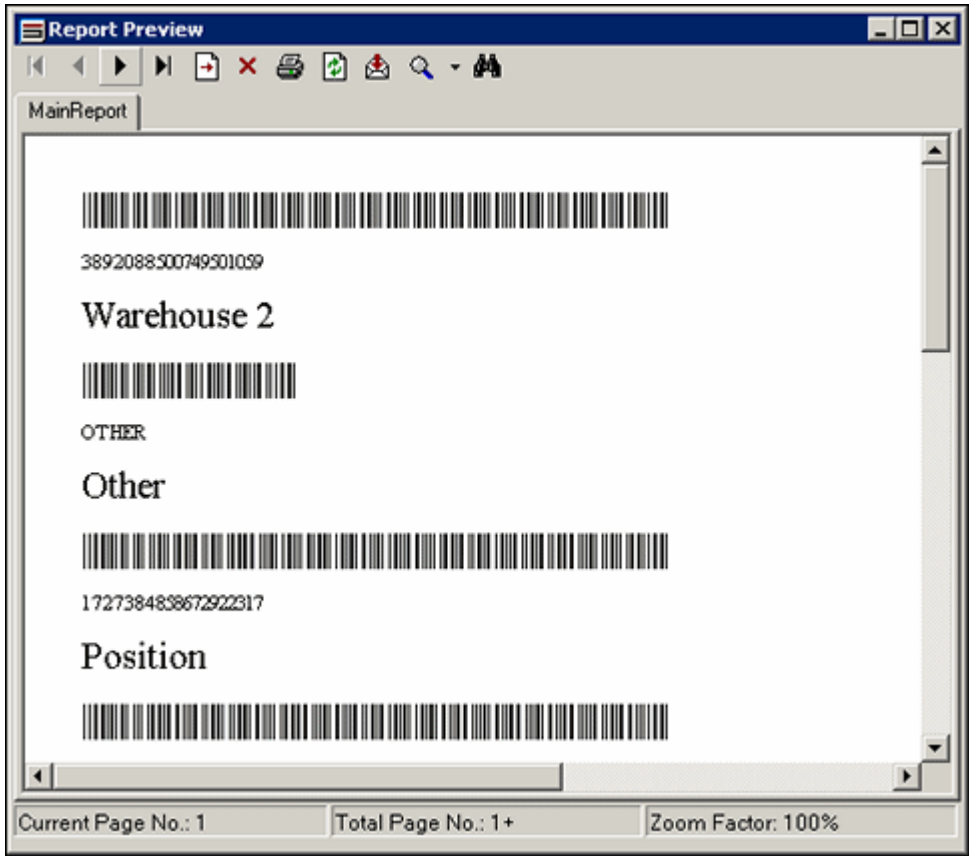
To open a report profile in the [Report Design Screen](#) (page A-11), double-click its line.

 **Note:** This screen is not displayed if only one report is defined.











Report Preview Screen


Use the Report Preview screen to view a generated report before processing it further (for example, printing it). This screen is displayed after you click the **Print** button on the [Print Labels Screen](#) (page A-14) or [Print Report Screen](#) (page A-16) and select a PLB or PRT file to be processed.

Figure A-9 Report Preview screen



The table below describes the button bar on the Report Preview screen.

Feature	Description
	Click this button to move to the first page (if the report consists of multiple pages).
	Click this button to move to the previous page (if the report consists of multiple pages).
	Click this button to move to the next page (if the report consists of multiple pages).
	Click this button to move to the last page (if the report consists of multiple pages).
	Click this button to move to a page that you specify (if the report consists of multiple pages).
	Click this button to close the current view and return to the Print Labels Screen (page A-14).
	Click this button to print the current report. The standard Windows Print dialog is displayed, where can select the printer, specify the number of copies, select the paper orientation, and start the printing process.
	Click this button to refresh the current report view.
	Click this button to export the current report to any of the following formats supported by Crystal Reports: <ul style="list-style-type: none"> ❖ Crystal Reports (RPT) ❖ Adobe Acrobat (PDF) ❖ Microsoft Excel (XLS) ❖ Microsoft Excel Data Only (XLS) ❖ Microsoft Word (DOC) ❖ Rich Text Format (RTF)
	Click the down arrow to select a zoom level from a list, and zoom in on the current report view.

Feature	Description
	Click this button to search for text in the current report.

WORKING WITH THE PRINT REPORT UTILITY

This section covers the following topics:

- ❖ [Printing Labels](#) (page A-23)
- ❖ [Printing Reports](#) (page A-24)
- ❖ [Modifying an Existing Label Format Definition](#) (page A-24)
- ❖ [Generating Report Schema](#) (page A-25)
- ❖ [Generating Function Labels](#) (page A-26)

Printing Labels

Use this procedure to print labels that were generated by Physical Content Manager in the PLB format:

1. Click on the **Print Labels** button (or the image next to it) on the [main Print Report Utility screen](#) (see page A-5).

The [Print Labels Screen](#) (page A-14) is displayed.

2. Select a **Label** that should be used for the PLB file. There is a label code for each defined [label profile](#) (see page A-4).

3. Click on the **Print** button.



A file selection dialog is displayed.

4. Navigate to the data file (with file extension PLB) that you want to print, select it, and close the file selection dialog.



Important: Make sure that you select a PLB file which contains data that is compatible with the selected label profile. For example, if the PLB data file contains data for user labels, you should select a label profile for user labels. Otherwise, you may end up with blank (or otherwise malformed) labels. This is because the format file contains references to data fields that may not be present in the data file.

The [Print Options Screen](#) (page A-18) is displayed.

5. Click the print icon () to print the generated report, or the export icon () to save it to one of the [supported formats](#) (see page A-22).

Printing Reports

Use this procedure to print reports that were generated by Physical Content Manager in the PRT format:

1. Click on the **Print Reports** button (or the image next to it) on the [main Print Report Utility screen](#) (see page A-5).

The [Print Report Screen](#) (page A-16) is displayed.

2. Select a **Report** that should be used for the PRT file.
3. Click on the **Print** button.



A file selection dialog is displayed.

4. Navigate to the data file (with file extension PRT) that you want to print, select it, and close the file selection dialog.



Important: Make sure that you select a PRT file which contains data that is compatible with the selected report profile. For example, if the PRT data file contains data for user reports, you should select a report profile for user reports. Otherwise, you may end up with blank (or otherwise malformed) reports. This is because the format file contains references to data fields that may not be present in the data file.

The [Print Options Screen](#) (page A-18) is displayed.

5. Click the print icon () to print the generated report, or the export icon () to save it to one of the [supported formats](#) (see page A-22).

Modifying an Existing Label Format Definition

Use this procedure to modify an existing label format definition (as laid down in a [format file](#); see page A-4).



Important: You need the Crystal Reports software to modify label format definitions. This software is *not* provided with Physical Content Manager and needs to be purchased separately.

To modify a label format definition, complete the following steps:

1. Choose **Options—Design—Labels**.

The [Design Labels Screen](#) (page A-7) is displayed.

2. Use the file selection button next to the **Label Format File** field to select the [format file](#) (see page A-4) that you want to modify.
3. Click the **Create/Modify Report** button to start the Crystal Reports application.



Note: An error message is displayed if the executable file of the Crystal Reports application (crw32.exe) could not be located on your computer.

Modifying an Existing Report Format Definition

Use this procedure to modify an existing report format definition (as laid down in a [format file](#); see page A-4).



Important: You need the Crystal Reports software to modify report format definitions. This software is *not* provided with Physical Content Manager and needs to be purchased separately.

To modify a report format definition, complete the following steps:

1. Choose **Options—Design—Reports**.

The [Report Design Screen](#) (page A-11) is displayed.

2. Use the file selection button next to the **Report Format File** field to select the [format file](#) (see page A-4) that you want to modify.
3. Click the **Create/Modify Report** button to start the Crystal Reports application.



Note: An error message is displayed if the executable file of the Crystal Reports application (crw32.exe) could not be located on your computer.

Generating Report Schema

Use the following procedure to generate an XML report schema for a PLB or PRT data file created by Physical Content Manager. This may be useful if you want to your own label or report format definition in Crystal Reports, especially if you want to include custom PCM metadata field for physical content.

To generate a report schema, complete the following steps:

1. Select **Options—Generate Schema**.

A file selection dialog is displayed.

2. Navigate to the data file (with file extension PLB or PRT) for which you want to generate an XML report schema file, select it, and close the file selection dialog.

The XML report schema file (with file extension .XSD) is generated for the selected PLB or PRT file. The file is stored in the following location:

```
[Print_Report_Utility_Install_Dir]\bin\[File_Name].xsd
```

where the file name is the name of the result set as specified in the PLB or PRT file, for example *dsSTORAGE_INFO.xsd*.

You can use the generated .XSD file and attach it to a report in Crystal Reports.

Generating Function Labels

Use this procedure to print function labels that can be read by the barcode scanner and used to track the location of physical items. The function label file contains transfer barcodes for each of the [barcode actions](#) (see page 8-3):

- ❖ Check-out
- ❖ Check-in
- ❖ Set Home/Actual Locations

To generate the function labels, complete the following steps:

1. Click on the **Print Labels** button (or the image next to it) on the [main Print Report Utility screen](#) (see page A-5).

The [Print Labels Screen](#) (page A-14) is displayed.

2. Click on the **Print Function Labels** button.



Note: You do not need to select a label code before clicking the Print Function Labels button.

The [Report Preview Screen](#) (page A-21) is displayed, showing transfer barcodes for each of the available [barcode actions](#).

3. Use any of the controls on the [Report Preview Screen](#) (page A-21) to further process the file.

USING THE BARCODE UTILITY

OVERVIEW

This section covers the following topics:

- ❖ [About the Barcode Utility](#) (page B-2)
- ❖ [Installing and Starting the Barcode Utility](#) (page B-2)
- ❖ [Barcode Utility Interface](#) (page B-3)
 - [Main Barcode Utility Screen](#) (page B-3)
 - [Barcode Upload Screen](#) (page B-5)
 - [Configure Host List Screen](#) (page B-6)
 - [Barcode Upload Results Screen](#) (page B-7)
 - [Program Videx Barcode Wand Screen](#) (page B-8)
- ❖ [Working With the Barcode Utility](#) (page B-9)
 - [Uploading Barcode Data Directly to PCM](#) (page B-9)
 - [Saving Barcode Data to a File](#) (page B-10)
 - [Uploading Previously Saved Barcode Data to PCM](#) (page B-11)
 - [Programming the Barcode Scanner](#) (page B-12)

ABOUT THE BARCODE UTILITY

The Barcode Utility software is a Windows application that provides an interface with the Videx LaserLite barcode scanner used with Physical Content Manager. This enables you to read the information in the barcode scanner and [upload](#) it into the Physical Content Manager application (see page B-9). You can also read the barcode information and write it to a file for [manual processing](#) at a later time (see page 8-4). In addition, the Barcode Utility enables you to [reprogram](#) the barcode scanner, should that be necessary (see page B-12).

INSTALLING AND STARTING THE BARCODE UTILITY

The Barcode Utility software is provided with Physical Content Manager, but is not automatically installed with the Physical Content Manager software. You will need to install it manually after installing the PCM software.

The installer for the Barcode Utility is included on the Physical Content Manager software distribution media, and, after installation of the PCM software, is also located on the computer running PCM in the `[CS_Instance_Dir]\custom\PhysicalContentManager\Client\` directory.



Important: You need the Microsoft .NET Framework Version 1.1 Redistributable Package to run the Barcode Utility. If you do not already have this on your computer, you can download it from the [Microsoft website](http://www.microsoft.com) (www.microsoft.com).

You can install the Barcode Utility on any computer as long as that computer can connect to the barcode scanner. You do not need to install this utility on the same computer as Physical Content Manager if you plan to store the uploaded data in a file for use later with PCM.



Important: If you upgrade the Barcode Utility from an earlier version, you *must* uninstall the existing instance before installing the new release. If you do not, an error message is reported during the installation and you will not be able to proceed.

Installing the Software

To install the Barcode Utility, complete the following steps:

1. Locate the executable installer file, named *BarcodeUtility.exe*, which is stored in *[CS_Instance_Dir]\custom\PhysicalContentManager\Client* or on the Physical Content Manager distribution media.
2. Double-click the executable file to start the installer.
3. Follow the instructions on screen to install the software. By default, the software is installed in *C:\Program Files\Oracle\Barcode Utility*, but you can select a different directory for installation.

Starting the Software

After installing the Barcode Utility software, you can start it by clicking **Start—Programs—Oracle—Barcode Utility—Barcode Utility**. You can also double-click the utility icon on the Windows desktop.

BARCODE UTILITY INTERFACE

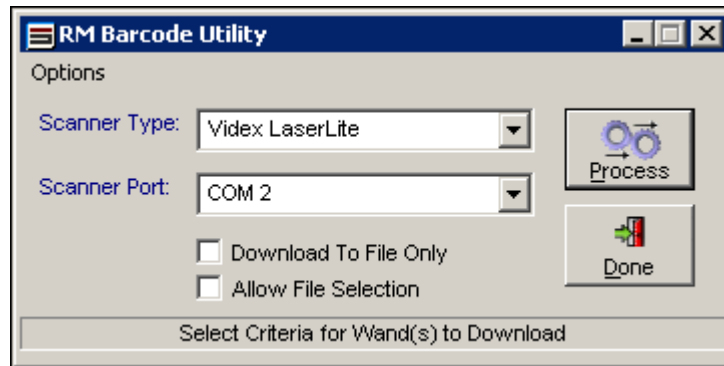
The Barcode Utility has the following user interface screens:

- ❖ [Main Barcode Utility Screen](#) (page B-3)
- ❖ [Barcode Upload Screen](#) (page B-5)
- ❖ [Configure Host List Screen](#) (page B-6)
- ❖ [Barcode Upload Results Screen](#) (page B-7)
- ❖ [Program Videx Barcode Wand Screen](#) (page B-8)

Main Barcode Utility Screen

The main Barcode Utility screen is used to upload information to the Physical Content Manager software or write it to a file. Access this screen by starting the Barcode Utility application.

Figure B-1 Main Barcode Utility screen



The table below describes the various features of the main Barcode Utility screen.

Feature	Description
Options menu	This menu has one option called “Program Videx Wand.” If you choose this option, the Program Videx Barcode Wand Screen (page B-8) is displayed.
Scanner Type	Select the barcode scanner type. There is currently only one supported scanner type.
Scanner Port	Select the communication port that the barcode scanner or its base station is connected to. Normally this is COM1, which is a commonly used serial port.
Download to File Only	Select this check box if you want the barcode scanner data to be written to a file for later processing (see page B-11).
Allow File Selection	Select this check box to select a previously stored file for processing.
Process button	Click this button to start the upload process. The barcode scanner data will either be directly uploaded to the Physical Content Manager application, or, if you selected the Allow File Selection check box, a file selection dialog is displayed, where you can select the file to be uploaded.
Done button	Click this button to close the Barcode Utility application.

Barcode Upload Screen

The Barcode Upload screen is used to specify the content server instance that data will be uploaded to. You specify the host name, as well as the user name and password that should be used to connect to the host name.

To access this screen, complete the following steps:

1. On the [main Barcode Utility screen](#) (see page B-3), select the **Allow File Selection** check box.
2. Click the **Process** button
A file selection dialog is displayed.
3. Navigate to the file to be processed, select it, and close the file selection dialog.

Figure B-2 Barcode Upload screen

The table below describes the various features of the Barcode Upload screen.

Feature	Description
Host	Enter or select the name of the content server instance that the barcode information should be uploaded to. (This instance should be running the Physical Content Manager software.) You specify the available hosts in the dropdown list in the Configure Host List Screen (page B-6).
User	Enter the login name of the user who will connect to the content server instance to upload the barcode data.
Password	Enter the login password of the user who will connect to the content server instance to upload the barcode data.

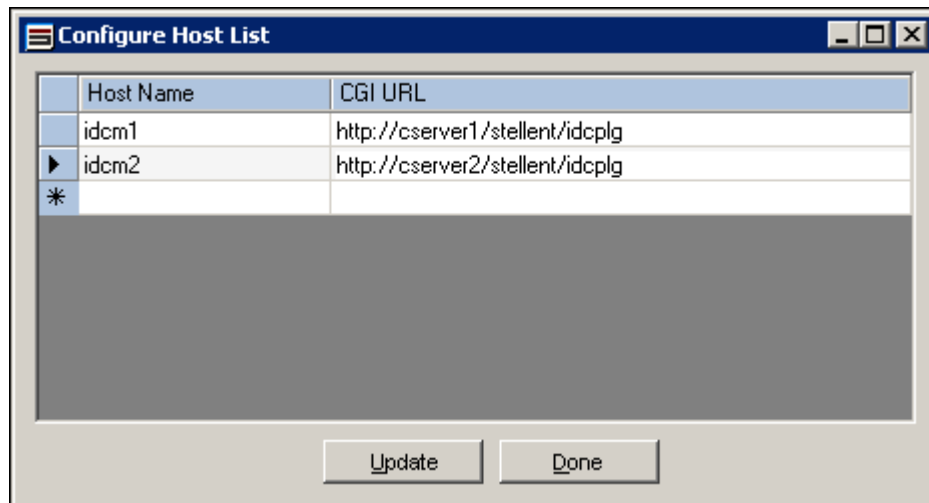
Feature	Description
Advanced button	Click this button to display the Configure Host List Screen (page B-6), where you can specify all content server instances that barcode data can be uploaded to.
Submit button	Click this button to start uploading the selected file to the specified content server instance.
Done button	Click this button to exit this screen and return to the main Barcode Utility screen (see page B-3).

Configure Host List Screen

The Configure Host List screen is used to specify the content server instances that barcode data can be uploaded to. The defined hosts are included in the Host dropdown list on the [Barcode Upload Screen](#) (page B-5).

To access this screen, click the **Advanced** button in the [Barcode Upload Screen](#) (page B-5).

Figure B-3 Configure Host List screen



The table below describes the various features of the Configure Host List screen.

Feature	Description
Host Name	Enter the name of a content server instance that barcode information can be uploaded to. (This instance should be running the Physical Content Manager software.)
CGI URL	Enter the URL of the 'idcplg' directory of the content server instance. This information is required to establish a connection to the content server.
Update button	Click this button to save the current host list.
Done button	Click the button to close this screen and return to the Barcode Upload Screen (page B-5).

Barcode Upload Results Screen

The Barcode Upload Results screen is displayed after uploading a stored barcode file. It provides information on what was processed, and also shows the upload results of each item that was processed (including any error messages).

Figure B-4 Barcode Upload Results screen

Error	Date	Type	Object	Barcode ID	Location Type	Location	Message
<input checked="" type="checkbox"/>	02/22/2006 09:14:03 AM	Set Home & Actual		ITEM1	Storage Item	LOCATION	The external item 'ITEM1' does not exist.
<input type="checkbox"/>	02/22/2006 09:14:04 AM	Set Home & Actual		ITEM2	Storage Item	LOCATION	
<input type="checkbox"/>	02/22/2006 09:14:05 AM	Set Home & Actual		ITEM3	Storage Item	LOCATION	

The table below describes the various features of the Barcode Upload Results screen.

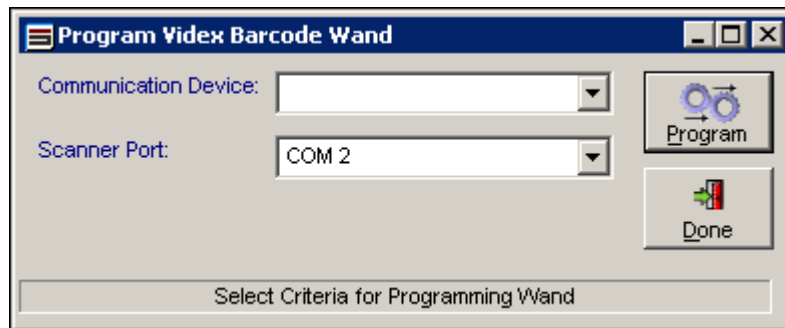
Feature	Description
Error	This check box indicates if an error occurred during processing of an item. The error message is displayed in the Message column.
Date	This is the date and time that the information for the item was scanned by the barcode scanner.

Feature	Description
Type	This is the type of action that was performed for the item. Three action are possible: Check In, Check Out, and Set Home & Actual. For further details, refer to Barcode File Actions (page 8-3).
Object Type	This is the object type of the data item (for example, “Box” or “Folder”).
Barcode ID	This is the barcode value of the item as read by the barcode scanner. For storage items, this is the item’s name (as specified when it was created in Physical Content Manager).
Location Type	This is the location type of the item (for example, “Box” for items in a box, or “User” for checked-in or checked-out items).
Location	This is the barcode of the location that the item is assigned to (i.e., stored in).
Message	This shows a message if an error occurred during the transfer.

Program Videx Barcode Wand Screen

The Program Videx Wand screen is used to program the barcode scanner for use with Physical Content Manager. To access this screen, select **Options—Program Videx Wand** from the [main Barcode Utility screen](#) (see page B-3).

Figure B-5 Program Videx Barcode Wand screen



The table below describes the various features of the Program Videx Barcode screen.

Feature	Description
Communication Device	Select the device that is used to connect the barcode scanner to your computer. There are two options: Jet Eye —This is an infrared receiver device that is connected to a COM port on the computer. You point the barcode scanner to the receiver to communicate with the computer. Base Station —This is a holder for the barcode scanner that is linked directly to the computer using a cable.
Scanner Port	Select the communication port that the barcode scanner or its base station is connected to. Normally this is COM1, which is a commonly used serial port.
Program button	Click this button to start the programming cycle of the barcode scanner.
Done button	Click this button to close the screen and return to the main Barcode Utility screen (see page B-3).

WORKING WITH THE BARCODE UTILITY

This section covers the following topics:

- ❖ [Uploading Barcode Data Directly to PCM](#) (page B-9)
- ❖ [Saving Barcode Data to a File](#) (page B-10)
- ❖ [Uploading Previously Saved Barcode Data to PCM](#) (page B-11)
- ❖ [Programming the Barcode Scanner](#) (page B-12)

Uploading Barcode Data Directly to PCM

After you finish gathering data with the scanner, the data can be directly uploaded to the server running the Physical Content Manager software. You can also [save the data to a file](#), and [upload](#) it later.

To upload the scanned barcode data directly to Physical Content Manager, complete the following steps:

1. Connect the scanner to the computer where the Barcode Utility is installed, either by placing the scanner in its base station or by using the connection cable.
2. **Start** the Barcode Utility application (see page B-2).
The **main Barcode Utility screen** (see page B-3) is displayed.
3. Select the scanner type.
4. Select the communication port where the barcode scanner is installed. Normally this is COM1, which is a commonly used serial port.
5. Make sure that the **Download To File Only** and **Allow File Selection** check boxes are both cleared.
6. Click the **Process** button.

You are prompted to begin the upload process.

7. Select **Yes** to continue.

The data is now transferred from the scanner to the PCM system. After all data has been transferred, a message is displayed, indicating that the operation is complete.



Important: If you select **No** when asked to confirm the upload, the data is erased from the barcode scanner and nothing is uploaded. The data is still available in a file called DATA.TXT (located in the installation directory of the Barcode Utility), but this file will be overwritten the next time data is uploaded or **saved to a file**.

Saving Barcode Data to a File

After you finish gathering data with the scanner, the data can be saved to a file for later processing. You can also **directly upload** it to the server running the Physical Content Manager software.

To save the scanned barcode data to a file, complete the following steps:

1. Connect the scanner to the computer where the Barcode Utility is installed, either by placing the scanner in its base station or by using the connection cable.
2. **Start** the Barcode Utility application (see page B-2).
The **main Barcode Utility screen** (see page B-3) is displayed.
3. Select the scanner type.

4. Select the communication port where the barcode scanner is installed. Normally this is COM1, a commonly used serial port.
5. Make sure that the **Download To File Only** check box is selected.
6. Click the **Process** button.

The data is stored in a file called DATA.TXT, which is located in the installation directory of the Barcode Utility (*C:\Program Files\Oracle\Barcode Utility* by default). See [Uploading Previously Saved Barcode Data to PCM](#) (page B-11) for details about uploading this data file at a later time.



Caution: Data is always stored in a file named DATA.TXT. If you do not rename the file, it is overwritten the next time data is downloaded and stored as a file.

Uploading Previously Saved Barcode Data to PCM

If you [saved barcode data to a file](#) for later processing (see page B-10), you can use the Barcode Utility application to move the data to the PCM software for use.



Note: You can also upload barcode data files from within the Physical Content Manager application. For details, refer to [Processing Barcode Files Manually](#) (page 8-4).

To upload a previously saved barcode data file to Physical Content Manager, complete the following steps:

1. [Start](#) the Barcode Utility application (see page B-2).

The [main Barcode Utility screen](#) (see page B-3) is displayed.

2. Make sure the **Allow File Selection** check box is selected, and click the **Process** button.

A file selection dialog is displayed, showing the contents of the Barcode Utility installation directory (which is the default location of saved barcode data files).

3. Select the file to be uploaded, or navigate to the directory where you stored the data files and select a file from that location. Click **Open**.

The [Barcode Upload Screen](#) (page B-5) is displayed.

4. Select the host name of the content server instance that you want to upload the data file. (The Physical Content Manager software needs to be installed on this computer.)

If you need to configure the list of available hosts, complete the following steps:

- a. Click the **Advanced** button.

The [Configure Host List Screen](#) (page B-6) is displayed.

- b. Enter the name of the instance where your content server is stored and the CGI URL for the instance.
 - c. Click **Update** to add multiple names.
 - d. Click **Done** when you are done.
5. Enter the user name and password for a person who is allowed to upload data. In order to upload data, you must have the predefined 'pcmadmin' role.
 6. Click **Submit**.

The barcode data file is processed and uploaded to the selected content server instance.

7. After the file upload has completed, a message is displayed. Click **OK**.

The [Barcode Upload Results Screen](#) (page B-7) is displayed, where you can review the results of the upload.

8. Click **Done** when you are done.

Programming the Barcode Scanner

Use the following procedure to program the barcode scanner for use with Physical Content Manager:

1. [Start](#) the Barcode Utility application (see page B-2).

The [main Barcode Utility screen](#) (see page B-3) is displayed.

2. Select **Options—Program Videx Wand**.

The [Program Videx Barcode Wand Screen](#) (page B-8) is displayed.

3. Choose the type of scanner to be programmed from the **Communication Device** dropdown list.
4. Choose the communication port that the device is connected to.
5. Click **Program** when you have made your selections.

A message appears, indicating that the application is communicating with the scanner. The dialog closes when the programming finishes.

6. Click **Done** on the [Main Barcode Utility Screen](#) (page B-3).
7. Push the **Scan** button on the scanner.

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* zlib.h -- interface of the 'zlib' general purpose compression library
version 1.2.3, July 18th, 2005

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